

Industrial relations and social dialogue
**Representativeness of the
European social partner organisations:
Furniture sector**



Representativeness of the European social partner organisations: Furniture sector



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Country codes

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

Introduction

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

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

This section presents the objectives of the study along with a brief introduction to the chosen methodology. The context of this study is the European sectoral social dialogue committee (ESSDC) for the furniture sector. This report provides the information required for an assessment of the representativeness of the European social partner organisations involved in the furniture sector: the European Federation of Building and Woodworkers (EFBWW), the European Furniture Industries Confederation (EFIC) and the European Furniture Manufacturers Federation (UEA).

0.1. ESSDC for the furniture sector

The European sectoral social dialogue in the furniture sector started in 1999. In the early years, sectoral enlargement was an important topic, which is reflected in four joint opinions from 2002, 2004, 2006 and 2007. Other topics addressed by the ESSDC are training and health and safety. In 2018, a joint opinion of the European social partners for both the woodworking sector and the furniture sector was published. Annex 5 lists all the texts agreed by the sectoral social partners and Section 3.8 addresses their capacity to negotiate and their capacity to represent their members effectively in EU-level consultations. There are 14 agreed texts, all signed by the EFBWW, 12 signed by the UEA and 9 signed by EFIC. Two joint opinions have also been signed by CEI-Bois, which is the European employer organisation for the woodworking sector.

The synergies between the furniture and woodworking social partners date back to a meeting held on 26 May 2014, where the social partners were able to express their views on the subject of health and safety. The first joint working group meeting was held on 11 March 2016. Since 2016, two joint meetings involving the furniture and woodworking ESSDCs have been held every year. In addition, the furniture ESSDC and the woodworking ESSDC each have separate annual meetings.

0.2. Objectives of the study

Representativeness studies are conducted for four reasons.

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

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

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

To accomplish its aims, this study first identifies the relevant national social partner organisations in the furniture sector before analysing the structure of the sector's relevant European organisations, in particular their membership composition. This involves clarifying the unit of analysis at both national and European levels. The study includes only organisations whose membership domain is classed as 'sector-related' – that is, trade unions and employer organisations that have members in the sector and are involved in sector-related collective bargaining and/or in consultation on sector-related policies. In terms of territorial coverage, the study includes the 27 EU Member States.

0.3. Definitions and methodology

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

As far as **sector-relatedness** is concerned, the demarcation of the furniture sector has been established as covering Nomenclature of Economic Activities (NACE) code 31 (Manufacture of furniture).¹ Table 1 presents the economic activities under this NACE code.

¹ NACE (European statistical classification of economic activities), Rev. 2 (2008). For the demarcation of a specific sector, reference is made to one NACE code or a set of NACE codes, usually at the most detailed level (i.e. four digits). In this case, a single two-digit NACE code has been used.

Table 1: Demarcation of the furniture sector – NACE code 31 (Manufacture of furniture)

| NACE code | Activity |
|-----------|--|
| 31.01 | Manufacture of office and shop furniture |
| | <p>This class includes the manufacture of furniture of any kind and of any material (except stone, concrete or ceramic), for any place and for various purposes, including:</p> <ul style="list-style-type: none"> - manufacture of chairs and seats for offices, workrooms, hotels, restaurants and public premises - manufacture of chairs and seats for theatres, cinemas and the like - manufacture of special furniture for shops: counters, display cases, shelves, etc. - manufacture of office furniture - manufacture of laboratory benches, stools and other laboratory seating, and laboratory furniture (e.g. cabinets and tables) - manufacture of furniture for churches, schools and restaurants <p>This class also includes:</p> <ul style="list-style-type: none"> - decorative restaurant carts, such as dessert carts and food wagons <p>This class excludes:</p> <ul style="list-style-type: none"> - blackboards (see NACE 28.23) - manufacture of car seats (see NACE 29.32) - manufacture of railway car seats (see NACE 30.20) - manufacture of aircraft seats (see NACE 30.30) - manufacture of medical, surgical, dental or veterinary furniture (see NACE 32.50) - modular furniture attachment and installation, partition installation and laboratory equipment - furniture installation (see NACE 43.32) |
| 31.02 | Manufacture of kitchen furniture |
| | <p>This class includes:</p> <ul style="list-style-type: none"> - manufacture of kitchen furniture |
| 31.03 | Manufacture of mattresses |
| | <p>This class includes:</p> <ul style="list-style-type: none"> - manufacture of mattresses: <ul style="list-style-type: none"> - mattresses fitted with springs or stuffed or internally fitted with a supporting material - uncovered cellular rubber or plastic mattresses - manufacture of mattress supports <p>This class excludes:</p> <ul style="list-style-type: none"> - manufacture of inflatable rubber mattresses (see NACE 22.19) - manufacture of rubber waterbed mattresses (see NACE 22.19) |
| 31.09 | Manufacture of other furniture |
| | <p>This class includes:</p> <ul style="list-style-type: none"> - manufacture of sofas, sofa beds and sofa sets - manufacture of garden chairs and seats - manufacture of furniture for bedrooms, living rooms, gardens, etc. - manufacture of cabinets for sewing machines, televisions, etc. <p>This class also includes:</p> <ul style="list-style-type: none"> - finishing such as upholstery of chairs and seats - finishing of furniture such as spraying, painting, French polishing and upholstering <p>This class excludes:</p> <ul style="list-style-type: none"> - manufacture of pillows, pouffes, cushions, quilts and eiderdowns (see NACE 13.92) |

| |
|--|
| <ul style="list-style-type: none"> — manufacture of furniture of ceramic, concrete or stone (see NACE 23.42, 23.69 and 23.70) — manufacture of lighting fittings or lamps (see NACE 27.40) — manufacture of car seats (see NACE 29.32) — manufacture of railway car seats (see NACE 30.20) — manufacture of aircraft seats (see NACE 30.30) — reupholstering and restoring of furniture (see NACE 95.24) |
|--|

Sources: NACE (Rev. 2); Eurostat, 2023

Table 2 shows the membership domain patterns that can exist. The membership domains of trade unions and employer organisations can strictly correspond to the demarcation of the sector (see Table 1); this type of sector-relatedness is known as ‘congruence’. If the membership domain of an organisation goes beyond the furniture sector as defined here, it is categorised as ‘overlapping’. ‘Sectionalism’ is a type of sector-relatedness whereby an organisation covers part of the sector and nothing else, whereas organisations that fall into the category of ‘sectional overlap’ cover part of the sector and also have members in other sectors.

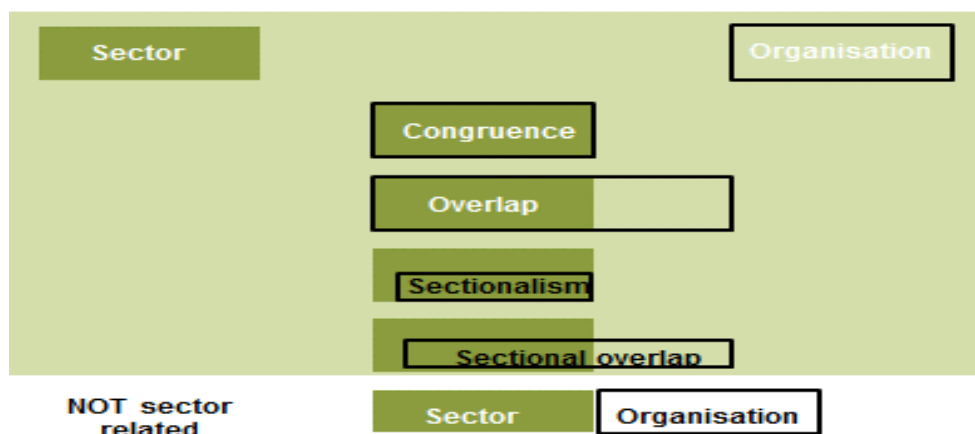
Table 2: Membership domain patterns of organisations

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

Source: Network of Eurofound Correspondents

Figure 1 presents the four types of sector-relatedness.

Figure 1: Four types of sector-relatedness



Source: Eurofound

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

The **organisational capacity** of the European social partners is analysed in terms of their ability to act on behalf of their members and to conclude binding agreements or commit to actions that can be implemented or monitored EU-wide through the support of their affiliates. To assess their capacity to negotiate, the organisations and the institutional objectives and decision-making structures provided for in their statutes are considered, as are the expected outcomes of their actions, for instance whether their institutional mission includes the possibility of negotiating and concluding agreements with other parties. The processes through which the organisations obtain mandates, support and approval from their member organisations in the negotiation process are also considered.

The involvement of social partners' members in national-level collective bargaining (or in social dialogue regarding sector-related policies) is important, as it shows that they have a mandate to negotiate on behalf of their members (at least at national level, which could then translate into a mandate to negotiate at EU level). Such a mandate, whether implicit or explicit, allows for negotiations to take place at European level that could potentially result in binding agreements or the drafting of European autonomous agreements, which require implementation by the social partners at national level, in line with their respective practices and traditions. The capacity to act autonomously to implement EU-wide agreements is an important aspect of the contribution that its members make to the effectiveness of the ESSDC.

Finally, representativeness also depends upon the organisations' structures and resources, their capacity to encourage the active participation of their members and combine the different interests of member organisations, and their ability to act autonomously at European level. Effective participation in the ESSDC is assessed in terms of presence at the ESSDC meetings in the two years before the year of publication of this report (taking into account the COVID-19 pandemic, during which the ESSDC process took place virtually, with tools and procedures that did not always optimally support the capacity to negotiate). Internal structures within the European organisations to prepare for ESSDC meetings and discuss social affairs can increase efficiency and ensure that more organisations feel represented than those that directly participate in the meetings.²

0.4. Data collection and quality control measures

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

² More definitions of key terms can be found in Eurofound's European Industrial Relations Dictionary, available at <https://www.eurofound.europa.eu/observatories/eurwork/industrial-relations-dictionary>

looks at the organisations involved in furniture sector-related collective bargaining and social dialogue in the EU Member States covered by this study and their membership of European-level organisations.

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

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

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

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

First, combining the top-down and bottom-up approaches, information on the affiliates of the relevant EU-level social partners and other sector-related associations was collected from the reports prepared by the Network of Eurofound Correspondents, between May 2021 and October 2021. Subsequently, Eurofound research managers and the authors of this report checked the consistency of the national contributions and, where necessary, asked the national correspondents to revise them between December 2021 and February 2022. A list of the national correspondents who contributed to this study can be found in Annex 6.

An overview of the data collected in this study was made available to the European social partners to allow their affiliates to double-check and comment on the interim findings between June and August 2022. Once the data tables had been updated, the draft report was finalised in the second half of 2022 and further streamlined and finalised in early 2023. From 19 April 2023 to 19 May 2023, social partners were consulted on the draft report. This was a first informal (pre-evaluation) consultation. With their comments as guidance, the report was finalised and prepared for formal written evaluation by the Eurofound Industrial Relations Advisory Committee and the European-level sectoral social partners identified in the report.

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

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

0.5. Structure of the report

The report consists of three main parts. It begins with a brief summary of the background and specificities of the furniture sector. It then analyses the relevant social partner organisations in the 27 EU Member States. The third part considers the representative associations at European level.

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

1. Economic background and employment specificities of the sector

1.1. Employment in the furniture sector

In 2019, the EU furniture sector employed some 850,000 people,³ representing 0.45% of the 190 million employed people in the EU. Table 3 shows the number of employees per country and the percentage of furniture sector workers as a share of all employees in each country and as a share of the EU27 sectoral workforce. In absolute numbers, the furniture sector is largest in Poland (186,886), Germany (142,105) and Italy (108,715), accounting for 51.4% of the total EU27 furniture sector workforce. Considering the share of total national employment, the furniture sector is largest in Lithuania, where 2.3% of the workforce is employed in the furniture sector. Estonia and Poland occupy joint second place, with 1.2%.

Table 3: Employees in the furniture sector, 2019

| MS | Employees in NACE 31.01 (office and shop furniture) | Employees in NACE 31.02 (kitchen furniture) | Employees in NACE 31.03 (mattresses) | Employees in NACE 31.09 (other furniture) | Employees in the entire furniture sector (NACE 31.01, 31.02, 31.03 and 31.09) | Share of total employment in the country (%) | Share of the total EU27 sectoral workforce (%) |
|-------------|---|---|--------------------------------------|---|---|--|--|
| EU27 | 177,117 | 90,438 | 40,000 | 544,736 | 852,291 | 0.45 | 100 |
| | 21% | 11% | 5% | 64% | 100% | | |
| PL | 31,389 | 14,050 | 6,184 | 135,263 | 186,886 | 1.2 | 21.9 |
| DE | 38,505 | 21,606 | 4,966 | 77,028 | 142,105 | 0.4 | 16.7 |
| IT | 20,459 | 9,273 | 4,107 | 74,876 | 108,715 | 0.5 | 12.8 |
| RO | 8,202 | 1,368 | 1,019 | 49,599 | 60,188 | 0.8 | 7.1 |
| ES | 9,611 | 6,551 | 4,848 | 31,614 | 52,624 | 0.3 | 6.2 |
| FR | 14,578 | 7,548 | 4,117 | 13,491 | 39,734 | 0.1 | 4.7 |
| PT | 4,061 | 3,030 | 1,898 | 22,749 | 31,738 | 0.7 | 3.7 |
| LT | 4,493 | 969 | 1,340 | 23,456 | 30,358 | 2.3 | 3.6 |
| AT | 3,495 | 1,368 | 535 | 18,860 | 24,258 | 0.6 | 2.8 |
| BG | 2,383 | 2,104 | 1,056 | 16,044 | 21,587 | 0.7 | 2.5 |
| CZ | 4,483 | 1,502 | 1,186 | 12,823 | 19,994 | 0.4 | 2.3 |
| NL | 10,103 | 2,183 | 764 | 5,040 | 18,090 | 0.2 | 2.1 |
| HU | 3,070 | 1,707 | 319 | 12,023 | 17,119 | 0.4 | 2.0 |
| SE | 5,707 | 3,830 | 1,032 | 3,494 | 14,063 | 0.3 | 1.7 |

³ EFIC indicates that, according to its data, there are about one million workers in the furniture sector in the EU27. However, the Eurostat data for the respective NACE codes, for 2019, give an EU furniture sector workforce of 852,291 employees, which is the number used in Table 3. Because of the impact of COVID-19 on workforce numbers, the number from 2019 is provided, as 2019 was the last pre-COVID-19 year.

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| | | | | | | | |
|-----------|-------|-------|-------|--------|---------------|------|------|
| SK | 1,244 | 302 | 242 | 10,924 | 12,712 | 0.5 | 1.5 |
| HR | 2,093 | 1,148 | 1,590 | 6,303 | 11,134 | 0.7 | 1.3 |
| BE | 1,993 | 2,348 | 1,751 | 4,675 | 10,767 | 0.2 | 1.3 |
| DK | 2,092 | 2,357 | 699 | 4,175 | 9,323 | 0.4 | 1.1 |
| EL | 1,969 | 1,141 | 1,179 | 4,140 | 8,429 | 0.2 | 1.0 |
| EE | 1,059 | 660 | 144 | 5,812 | 7,413 | 1.2 | 0.9 |
| FI | 1,833 | 2,194 | 243 | 2,303 | 6,573 | 0.3 | 0.8 |
| LV | 1,188 | 325 | 151 | 4,606 | 6,270 | 0.7 | 0.7 |
| SI | 1,795 | 574 | 77 | 3,011 | 5,457 | 0.6 | 0.6 |
| CY | 229 | 58 | 162 | 477 | 926 | 0.2 | 0.1 |
| MT | 15 | 12 | 48 | 797 | 872 | 0.4 | 0.1 |
| LU | n.d. | 0 | n.d. | n.d. | 177 | 0.06 | 0.02 |
| IE | n.d. | n.d. | n.d. | n.d. | n.d. | - | - |

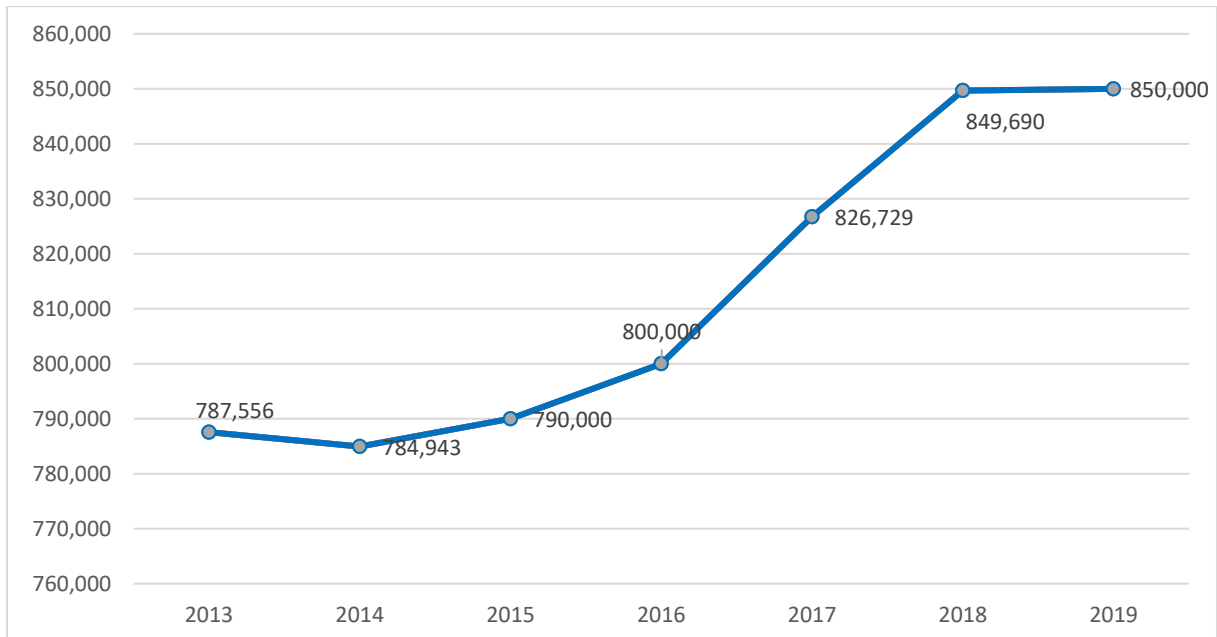
Notes: Data for Estonia for NACE codes are for 2018. Data for Ireland and Luxembourg (for NACE codes) are confidential. MS, Member State; n.d., no data.

Source: Eurostat, Structural Business Statistics, 2021

In terms of size of subsectors, 'Manufacture of other furniture' (NACE 31.09) is the largest subsector, with employees corresponding to 64% of furniture sector workers in the EU27. 'Manufacture of office and shop furniture' (NACE 31.01) is the second largest subsector, employing 21% of the total employees in the furniture sector. There are also significant differences at country level. For example, in the Netherlands, Sweden and France, 'Manufacture of office and shop furniture' is the most important part of the furniture sector, representing 56%, 41% and 37% of all workers in this sector, respectively. In Belgium and Cyprus, about 17% of the sectoral workforce is employed in 'Manufacture of mattresses' (NACE 31.03) whereas the average result for the EU27 is 4.5%.

As shown in Figure 2, the number of employees in the furniture sector in the EU27 increased by around 62,400 workers (8%) between 2013 and 2019. Considering the furniture sector by NACE code, the largest proportional increase – from 32,384 employees to 40,000 employees – was in 'Manufacture of mattresses' (23.5%). At the same time, the numbers of employees in 'Manufacture of kitchen furniture' (NACE 31.02) and 'Manufacture of office and shop furniture' (NACE 31.01) both increased by around 13% (see Figure 3). The change in the number of employees in 'Manufacture of other furniture' (NACE 31.09) was less dynamic (only 5%).

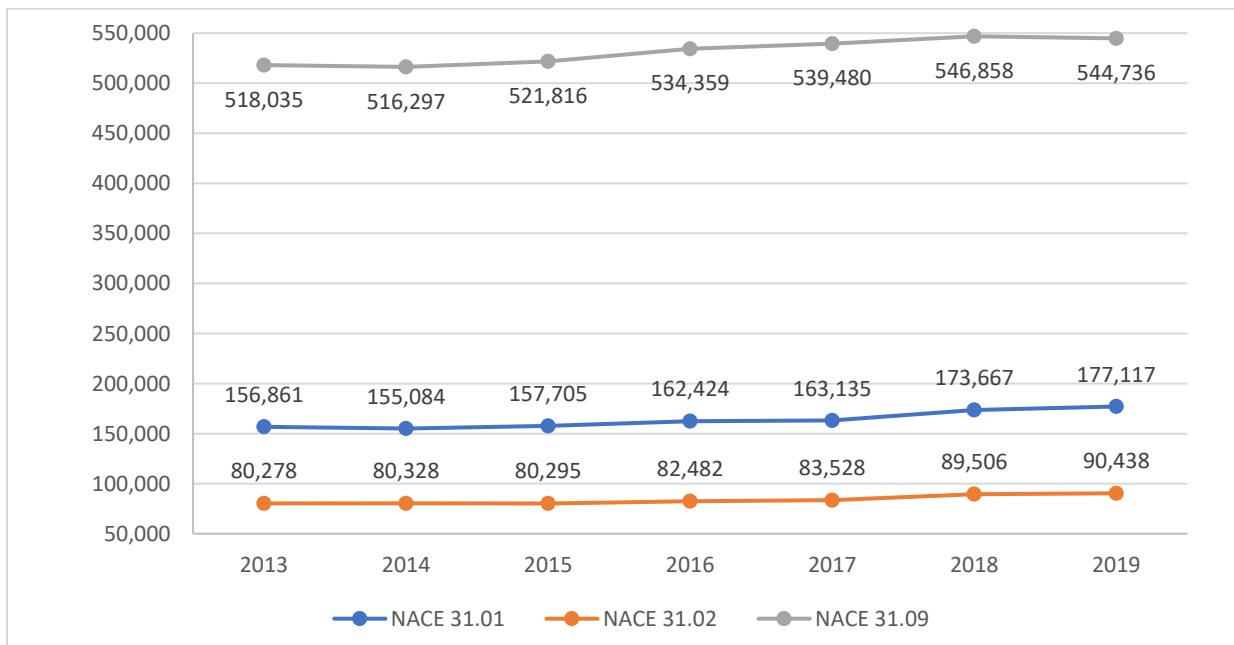
Figure 2: Number of employees in the furniture sector in the EU27, 2013–2019



Notes: For 2018, the number of employees was calculated using the data for the EU28 minus the data for the United Kingdom. The number of employees for 2019 is an estimate.

Source: Eurostat, Structural Business Statistics

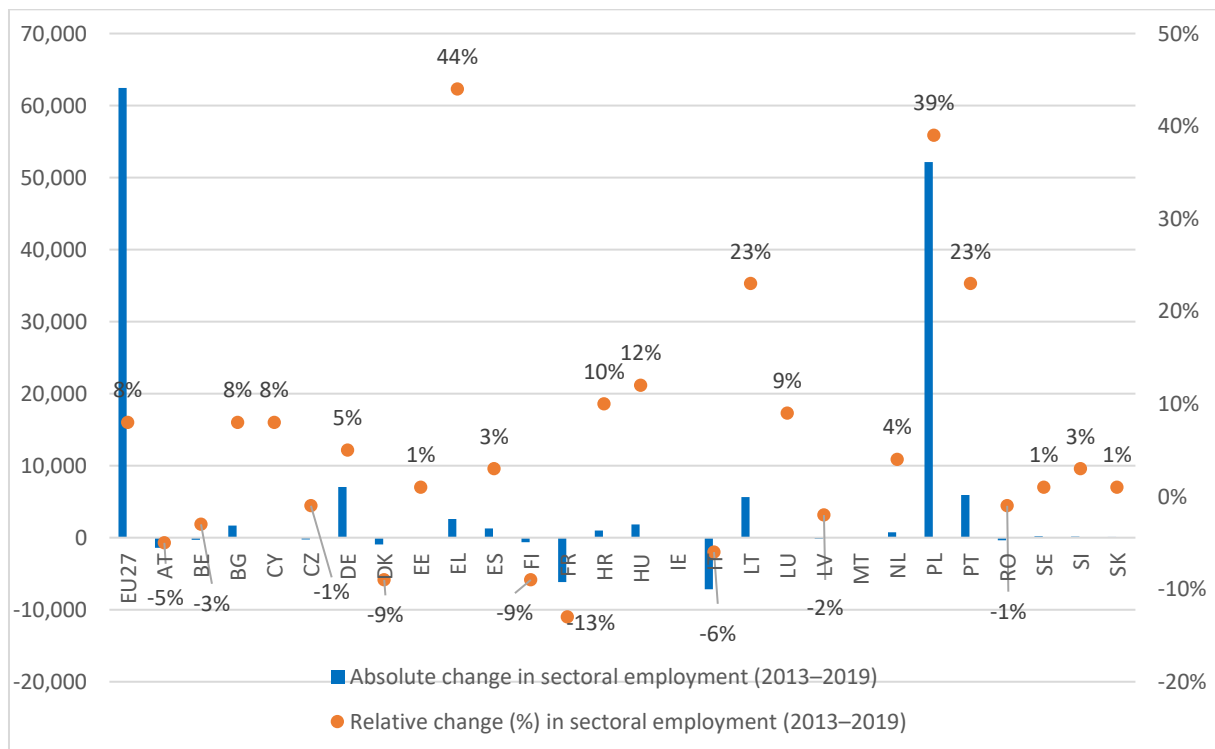
Figure 3: Number of employees in the furniture sector, by NACE code, in the EU27, 2013–2019



Source: Eurostat, Structural Business Statistics

Figure 4 demonstrates the changes in the number of workers in the furniture sector in particular countries between 2013 and 2019, in both absolute and relative terms. In the case of nine countries, there was a decrease in the employment in the analysed period. The greatest decline in relative terms took place in France (-13%). Considering absolute change, in the same period the biggest decrease occurred in Italy (-7,165). Poland shows a huge increase in the number of employees in the analysed period, by over 52,000, which is 39% in relative terms. However, Greece turned out to be the country with the largest relative growth (44%).

Figure 4: Change in the number of employees in the furniture sector, 2013–2019

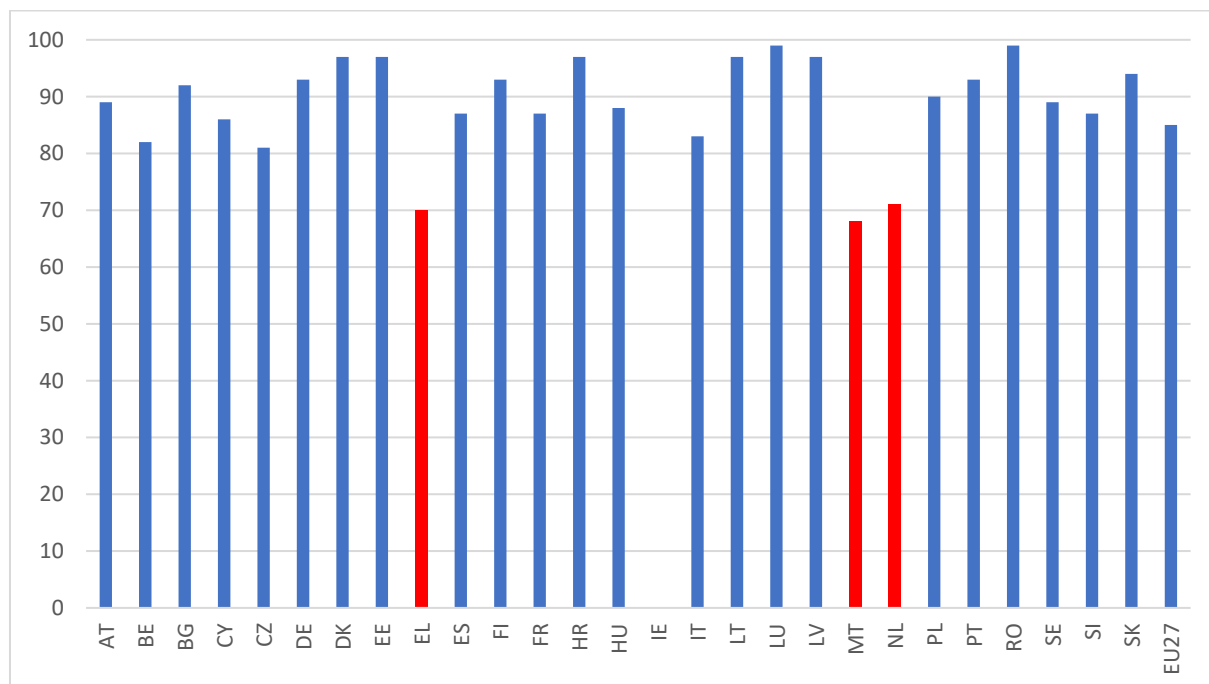


Note: There are no data for Malta and Ireland.

Source: Eurostat, Structural Business Statistics

Figure 5 illustrates the number of employees as a proportion of all those employed in the Member States in 2019. Data indicate that, in general, self-employment and other non-employee working relationships are not widespread in EU countries. Only in Greece, Malta and the Netherlands are there significant proportions of self-employed people or one-person businesses in the furniture sector (around 30%).

Figure 5: Employees as a proportion of all employed people (%), 2019



Note: There are no data for Ireland.

Source: Eurostat, Structural Business Statistics

Blue-collar workers (mainly doing manual work) make up the majority of workers in the furniture sector, generally between 70% and 80% (Table 4), with white-collar workers constituting the rest. An interesting example is Germany, where blue-collar workers constitute only 47% of all employees. The proportion of management staff in the workforce in this sector is generally only a few per cent. In Portugal, the share of management staff is one of the lowest, constituting 2.8%, considerably below the average share in manufacturing (4.2%) and far below the average in the entire private sector (8.5%). A share between 10% and 20% can be found in only a few countries, such as Croatia, France, Romania and Slovenia. According to Eurostat data, men make up most of the workers in the furniture sector, accounting for 77% of total employment in this sector in 2021. Information provided by the national correspondents indicates that in France the proportions of men and women in this sector have remained relatively stable over the last 10 years, with 28% for women. However, the ratio differs from one subsector to another (for example, more than 90% of workers in bedding are men) and according to the level of modernisation of the production lines. In Slovenia, 24% of those employed in the

furniture sector were women, whereas around 30% were women in Croatia, Latvia and Poland. The furniture sector is dominated by permanent, full-time employment contracts. Nevertheless, in Bulgaria the COVID-19 pandemic forced some employers to introduce shortened working hours. In addition, in Hungary the pandemic caused some fluctuations in the proportions of full-time and part-time workers. This might be explained by the fact that some full-time workers were probably enrolled in the government's COVID-19 short-time working scheme.

Table 4: Specificities of furniture sector employment

| Member State | Specificities of sectoral employment | Proportion of management staff in sectoral employment | Proportion of white-collar vs blue-collar workers in the sector |
|--------------|---|---|---|
| AT | The main types of contracts in the furniture sector are standard employment relationships. There are hardly any short-term contracts. There are some subcontracting companies. | Approximately 3–4% | 30%/70% |
| BE | The vast majority of workers are employed on the basis of standard full- or part-time contracts. | n.d. | The large majority are blue-collar workers |
| BG | The furniture sector is dominated by full-time workers under employment contracts. Moreover, this sector is characterised by an ageing and low-qualified workforce. There are a small number of education institutions providing relevant vocational training. | About 5% | 20%/80% |
| CY | The vast majority of workers in the furniture sector are employed under standard, full-time conditions. There are no subcontractors active in the sector. | 5% | 20%/80% |
| CZ | 98% of workers in the furniture sector have a permanent contract. Almost 97% of employees work full time. | 4.8% | 25%/75% |
| DE | In 2018, 11,000 people were registered as self-employed. Of them, some 6,000 employed their own staff. | n.d. | 53%/47% |
| DK | The workforce in the furniture sector mainly consists of skilled woodcutting machinists and cabinetmakers, as well as trained woodworkers. There are a limited number of temporary workers and self-employed people (3.5%). | 6% | n.d. |
| EE | There are rather low numbers of self-employed people, temporary staff and other non-standard workers. | Probably 5–9% | 20%/80% |
| EL | In 2020, of the total number of people employed in the sector, 61% were wage-earning employees. There is a high proportion of self-employed people (24% in 2020). Almost all employees are permanent staff. The vast majority of the employees work in companies with fewer than 10 people. | 6% | 6%/94% |
| ES | The predominant type of employment in the furniture sector is full time and open-ended. Temporary employment in the furniture sector stands at around 17–20% of all employment. | n.d. | 35%/65% |

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| | | | |
|-----------|---|---------------------|--------------------------------------|
| | Subcontracting is limited to some of the ancillary services required by the companies (cleaning, security, etc.). The number of self-employed people stands at around 20% and has been increasing in recent years. | | |
| FI | Permanent, full-time employment contracts are typical for the furniture sector. However, in comparison with manufacture of wood (NACE 16), part-time contracts, fixed-term contracts and employees working for subcontractors are more common. | Probably around 10% | 30%/60% |
| FR | 55% of employees carry out production and assembly activities. 75% of employees work on production sites. The difference in proportion between men and women has remained relatively stable over the last 10 years, with 28% of employees being women. Open-ended contracts represent 88% of employees' contracts. This sector makes considerable use of apprenticeships (4% of the workforce in 2017) compared with the other manufacturing sectors. | 11% | 24%/65% |
| HR | According to data provided by the Croatian Pension Insurance Institute at the end of February 2021, 68% of those employed in the furniture sector are men. Moreover, only 0.63% of the total number of employees work part time. According to the Ministry of Economy and Sustainable Development (2014), 46% of employees have secondary educational attainment, while 21% have primary educational attainment or less. Around 22% are qualified workers (vocational secondary education), while around 11% have tertiary educational attainment. Non-standard forms of employment are not common in the furniture sector. | 15% | Approximately 20%/80% |
| HU | Of the workers in the furniture sector in Q1 2021, 90% were registered as working full time. | n.d. | 20%/80% |
| IE | It is likely that nearly all employment in the furniture sector is covered by self-employed people and micro or small independent companies. Over the past 20 years, there has been an increasing reliance on the migrant workforce. | n.d. | Mostly blue-collar workers |
| IT | Nothing specific was noted. | 1% | 30%/70% |
| LT | The majority (approximately 60%) of sectoral employees work in large companies (with more than 150 workers) in which working conditions are fairly good and social dialogue most often takes place. | n.d. | Probably 20%/80% |
| LU | The furniture sector appears to be insignificant, with only 26 firms. | n.d. | 20%/80% |
| LV | Public sources do not highlight the furniture sector in relation to non-standard forms of employment. | 10.4% | The majority are blue-collar workers |
| MT | According to the National Statistics Office, the predominant mode of employment in the furniture industry is full-time employment. | 6.9% | 18%/82% |
| NL | Around 12% of those working in the furniture sector are subcontractors. Most employees have a full-time or part-time | <5% | 20%/80% |

Representativeness of the European social partner organisations: Furniture sector

| | | | |
|-----------|--|----------------------------------|---------|
| | employment contract. There is also a significant share of self-employed people in this sector. | | |
| PL | The standard job contract is the basis for employment for over 90% of employees in the furniture sector. However, some contracts are for a fixed period. There are few agency workers compared with the situation 10 years ago. Some employment agencies specialise in recruiting foreign workers. | n.d. | n.d. |
| PT | 78% of workers in the furniture sector have open-ended contracts, a slightly larger proportion than in manufacturing in general. There is a very low share of part-time workers (only 1.0%), far below the average in the private sector in general (7.5%). The average monthly wage in this sector is far below the average in manufacturing. | 2.8% | n.d. |
| RO | According to data from the National Institute of Statistics, production in the furniture sector decreased by 16.3% in 2020 compared with 2019. There has been a profound restructuring of the management of furniture factories in recent years. The high-performance technologies and equipment adopted in the vast majority of furniture factories have led to an increase in the competitiveness of furniture products. During the last 10 years, the furniture sector has been facing an acute workforce shortage. The biggest deficit is registered among qualified personnel. In general, 35% of workers in the furniture sector are in elementary occupations and 35% are in skilled occupations. | 11% (managers and professionals) | 20%/80% |
| SE | There is a relatively high proportion of one-person entities and small companies. | 5–10% | 35%/65% |
| SI | There are not many non-standard forms of employment. | 20% | 30%/70% |
| SK | The number of workers has been decreasing over the last five years. The number of self-employed people is rather low, and about 80% of them are active in NACE 31.09. | 5–15% | 20%/80% |

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

Source: *Network of Eurofound Correspondents' national contributions to this study, 2021*

According to the national correspondents, certain specificities of the furniture sector make it difficult for trade unions to organise workers (Table 5). The main factor is the structure of companies in this sector that is dominated by small and very small companies. For example, in France, trade unions seem to be well established in the largest companies (with 250 or more employees) (the 12 largest companies employ 22% of the sector's employees). However, there are difficulties in organising workers in small companies, because trade unions may appoint representatives only in companies with 50 employees or more. The other problems are high rates of self-employed people and one-person businesses (Greece) and increasing numbers of self-employed people (Spain). In addition, in Malta, furniture manufacturers employ a lot of part-time workers who are hired on a temporary basis to fulfil the requirements of sporadic contracts.

Table 5: Impact of workforce specificities on organising workers in the furniture sector

| Member State | Impact of workforce specificities on organising workers |
|--------------|--|
| AT | It is easier to organise workers in larger companies and blue-collar workers (organisational density among blue-collar workers is 60%). |
| BE | <p>It is difficult for trade unions to organise workers due to there being a lot of small and very small companies in the furniture sector. Moreover, obligatory social dialogue bodies at the company level start at 50+ employees (for health and safety committees) and 100+ employees (for works councils).</p> <p>However, employers report a fairly high level of trade union membership in small(er) companies as well as in large(r) ones.</p> |
| BG | It is almost impossible to establish trade unions within private companies because they are not welcomed by employers. |
| CY | It is difficult for trade unions to organise workers because the furniture industry is dominated by very small companies. |
| CZ | It is difficult for trade unions to organise workers because companies in the furniture sector are mostly small. |
| DE | No special features. |
| DK | No data. |
| EE | It is difficult for trade unions to negotiate collective agreements because the employers are not cooperative. |
| EL | High rates of self-employed people and one-person businesses and the fact that the great majority of people employed in the furniture sector work in companies with fewer than 10 employees make it difficult to organise workers in trade unions. |
| ES | Two factors make it difficult for workers to organise themselves in a trade union: the small size of many of the companies and the increasing number of self-employed people. |
| FI | The only factor that makes it difficult to organise workers is the size of the companies: the smaller the company, the lower the trade union density. |
| FR | Organising workers is more difficult in smaller companies with fewer than 10 employees, which employ more than 80% of the employees in the sector. Another factor hindering unionisation is the fact that many companies are family businesses. |
| HR | The furniture industry is characterised by the high number of small and medium-sized economic entities. Many employees in these companies are not trade union members and they are not particularly interested in trade union membership. |
| HU | The furniture sector is a small sector with a high proportion of blue-collar workers, where the propensity to unionise is low. |
| IE | It is difficult to organise workers in the furniture industry mostly because of the small size of enterprises (e.g. unionisation at micro level is virtually non-existent). |
| IT | No special features. |

| | |
|-----------|--|
| LT | Workers in larger companies traditionally have better working conditions and more often are organised in trade unions than those in smaller companies. |
| LU | No special features. |
| LV | It is more difficult for trade unions to organise workers in small companies, which employ about half of the employees in the furniture sector. |
| MT | Two factors make it difficult for workers to organise themselves in a trade union: atypical work arrangements and shrinkage of the sector due to the deluge of cheaper imports. |
| NL | No special features. |
| PL | The issue of individualism and freeriding among employees, particularly referring to those workers who earn the minimum wage, hinders the organisation of workers in trade unions. |
| PT | The size structure of companies makes trade union organisation more difficult. Furthermore, the low levels of school attainment, qualification and wages in the furniture sector, in combination with the high share of open-ended contracts, are factors that may hinder the organisation of workers. |
| RO | The large majority (80%) of companies in the furniture sector are microenterprises (1-9 employees), and it is difficult for them to meet the legal representativeness conditions or the conditions for collective bargaining. |
| SE | It is difficult to organise workers in a lot of smaller companies. |
| SI | The specificity of the furniture sector makes it easier for trade unions to organise workers. Most large and medium-sized companies, which employ almost half of the sectoral workforce, have trade unions. |
| SK | There are some difficulties in organising workers in trade unions in some companies. For example, there are no trade unions in the third largest company in the furniture sector (Ekoltech Lucenec). |

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

1.2. Companies in the furniture sector and economic development

According to Eurostat data, the production value of the furniture sector in the EU accounted for around €100 billion in 2019. The largest shares in the value of production were in Italy (€22,365 billion), Germany (€22,234 billion) and Poland (€11,295 billion). In 2019, 124,684 companies were actively involved in the furniture sector in the EU. Most of these were located in Poland, Italy, France and Spain. Together, these four countries account for almost half of all furniture companies in the EU (Table 6). The total number of companies in the furniture sector ranges from 22,551 in Poland to 26 in Luxembourg (where the furniture sector is insignificant).

Table 6: Companies in the furniture sector, by size, 2019

| Member State | Number of companies in sector | Company size | | | | | Average number of employees per company |
|--------------|-------------------------------|--|-----------------|-----------------|------------------|----------------|---|
| | | 1-9 employees | 10-19 employees | 20-49 employees | 50-249 employees | 250+ employees | |
| | | Total number of companies | | | | | |
| EU27 | 124,684 | 110,173 | 7,523 | 4,212 | 2,129 | 420 | 6.9% |
| | 100% | 88.4% | 6.0% | 3.4% | 1.7% | 0.3% | |
| | | Companies in the furniture sector by size (%) | | | | | |
| AT | 3,146 | 82.8 | 9.9 | 5.2 | 1.8 | 0.3 | 7.7 |
| BE | 2,376 | 90.2 | n.d. | 3.2 | 2.1 | n.d. | 4.5 |
| BG | 2,357 | 83.8 | 7.9 | 5.5 | 2.4 | 0.5 | 9.2 |
| CY | 305 | 92.8 | 3.9 | 2.3 | 1.0 | 0.0 | 3.0 |
| CZ | 5,539 | 92.8 | 3.0 | 2.6 | 1.5 | 0.1 | 3.6 |
| DE | 10,826 | 75.4 | 15.3 | 5.2 | 3.4 | 0.7 | 13.1 |
| DK | 652 | 77.8 | 8.4 | 8.3 | 4.4 | 1.1 | 14.3 |
| EE | 799 | 84.1 | 5.6 | 5.1 | 4.9 | 0.3 | 9.3 |
| EL | 3,497 | 94.0 | 3.3 | n.d. | n.d. | n.d. | 2.4 |
| ES | 11,052 | 89.0 | 5.9 | 3.7 | 1.3 | 0.1 | 4.8 |
| FI | 809 | 83.9 | 8.3 | 4.7 | 2.6 | 0.5 | 8.1 |
| FR | 11,699 | 95.5 | 2.0 | 1.6 | 0.8 | 0.2 | 3.4 |
| HR | 1,122 | 86.5 | 7.8 | 2.8 | 2.2 | 0.8 | 9.9 |
| HU | 3,229 | 91.4 | 4.6 | 2.3 | 1.3 | 0.3 | 5.3 |
| IE | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |

| | | | | | | | |
|----|--------|------|------|------|------|-----|------|
| IT | 16,505 | 83.3 | 9.8 | 4.9 | 1.7 | 0.2 | 6.6 |
| LT | 2,323 | 85.2 | 6.2 | 4.3 | 3.4 | 0.9 | 13.1 |
| LU | 26 | 69.2 | 26.9 | 3.8 | 0.0 | 0.0 | 6.8 |
| LV | 837 | 88.4 | 5.5 | 3.8 | 1.9 | 0.4 | 7.5 |
| MT | 452 | 94.9 | n.d. | n.d. | n.d. | 0.0 | 1.9 |
| NL | 9,603 | 96.2 | 2.1 | 1.1 | 0.5 | 0.1 | 1.9 |
| PL | 22,551 | 91.5 | 3.8 | 2.6 | 1.7 | 0.5 | 8.3 |
| PT | 4,479 | 84.3 | 8.2 | 5.3 | 2.1 | 0.2 | 7.1 |
| RO | 4,391 | 82.2 | 7.3 | 5.9 | 3.8 | 0.8 | 13.7 |
| SE | 3,824 | 94.4 | 2.7 | 1.6 | 0.9 | 0.4 | 3.7 |
| SI | 1,169 | 90.1 | 6.1 | 2.7 | 0.9 | 0.3 | 4.7 |
| SK | 1,116 | 87.0 | 5.3 | 4.9 | 2.1 | 0.7 | 11.4 |

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

Source: Eurostat, *Structural Business Statistics, 2019*

Germany, Italy and Poland have the largest sectoral workforces in the EU. In each of these countries, the workforce amounted to over 100,000 employees. In contrast, Finland, Malta and Slovenia have the smallest sectoral workforces, all under 10,000 employees (Table 7).

Table 7: Number of employees in enterprises of specific size groups

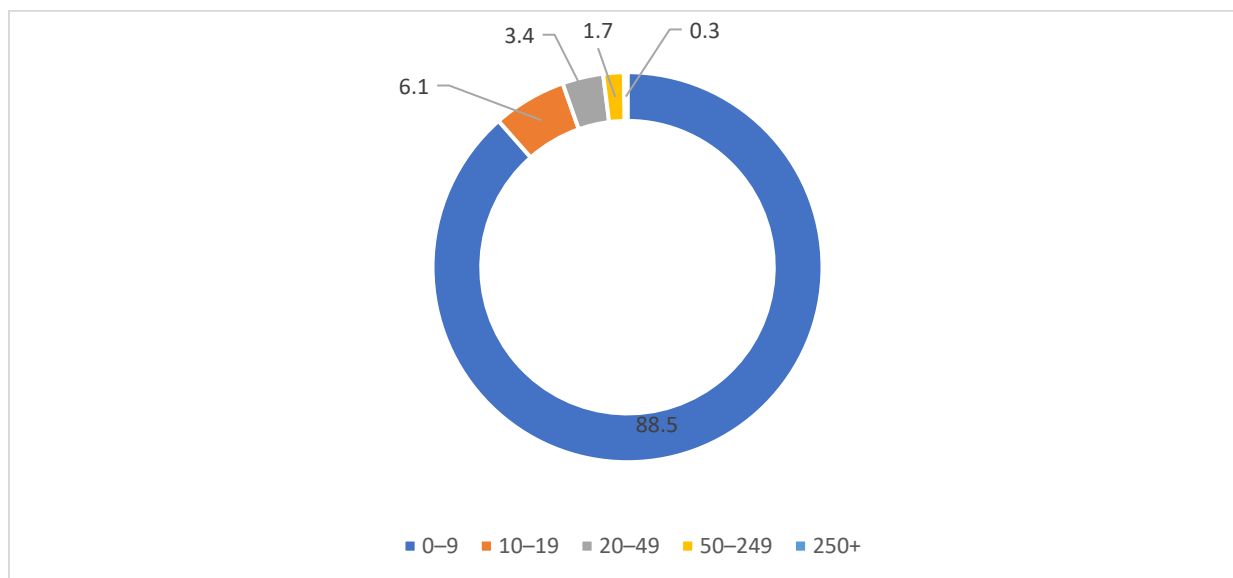
| Sectoral workforce | Member State (examples) | Number of employees, by company size group | | | |
|-----------------------------|-------------------------|--|--------------------------------|---------------------------------|-------------------------------|
| | | Companies with 1-9 employees | Companies with 10-49 employees | Companies with 50-249 employees | Companies with 250+ employees |
| Over 100,000 employees | DE | 17,974 | 31,667 | 42,251 | 44,103 |
| | IT | 37,060 | 47,366 | 28,509 | 16,981 |
| | PL | n.d. | 27,900 | 40,500 | 90,500 |
| 50,000-99,999 employees | ES | 12,670 | 20,350 | 13,451 | 6,153 |
| | RO | 8,319 | 12,275 | 17,485 | 21,653 |
| 10,000-49,999 employees | AT | 5,064 | 8,919 | 5,583 | 4,724 |
| | FR | 8,395 | 10,950 | 9,125 | 8,030 |
| | PT | 6,181 | 10,864 | 7,683 | 4,822 |
| Fewer than 10,000 employees | FI | 1,186 | 1,642 | 1,842 | 1,432 |
| | MT | 850 | 382 | 167 | 0 |
| | SI | 2,156 | 1,961 | 997 | 1,129 |

Notes: *n.d.*, no data. For Italy, data refer to employment. This table includes only the Member States for which data broken down by company size group are available.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

The sector consists mostly of microfirms with 1-9 employees. The average share of companies of this size class in the EU27 was 88.5% in 2019 (Figure 6), ranging from 69% in Luxembourg to 96.2% in the Netherlands. Companies with at least 250 employees account for less than 1% of all companies in the sector. The largest shares of companies with 10–49 employees were recorded in Luxembourg (26.9%) and Germany (15.3%). Mostly, the companies of these size classes accounted for 3–10% of all companies. Across the EU, companies had 12.1 employees on average. The highest averages were found in Greece (14.7), Denmark (14.1), Sweden (13.9) and Luxembourg (13.5). The lowest were found in Poland (2.7), the Netherlands (2.8), Spain (3.4), Czechia (3.5) and Croatia (3.9).

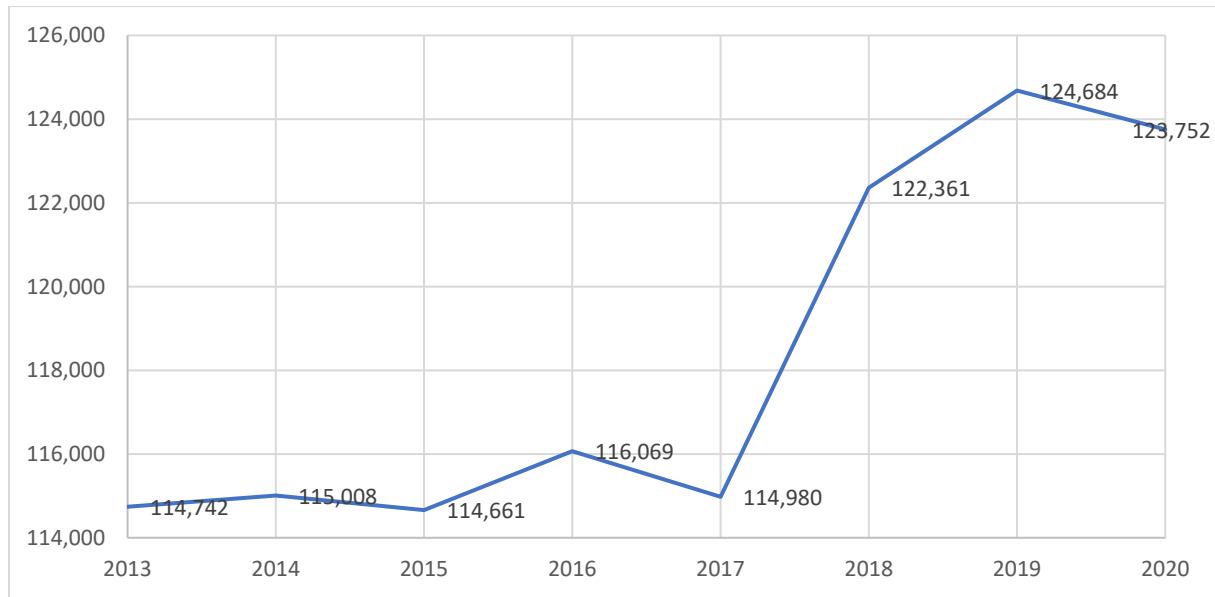
Figure 6: Share of enterprises per size class (%), 2019



Source: Eurostat, *Structural Business Statistics*, 2019

As shown in Figure 7, between 2013 and 2020 the number of active enterprises increased by 7.85%, reaching 123,752 in 2020. Particularly dynamic growth has been visible since 2017.

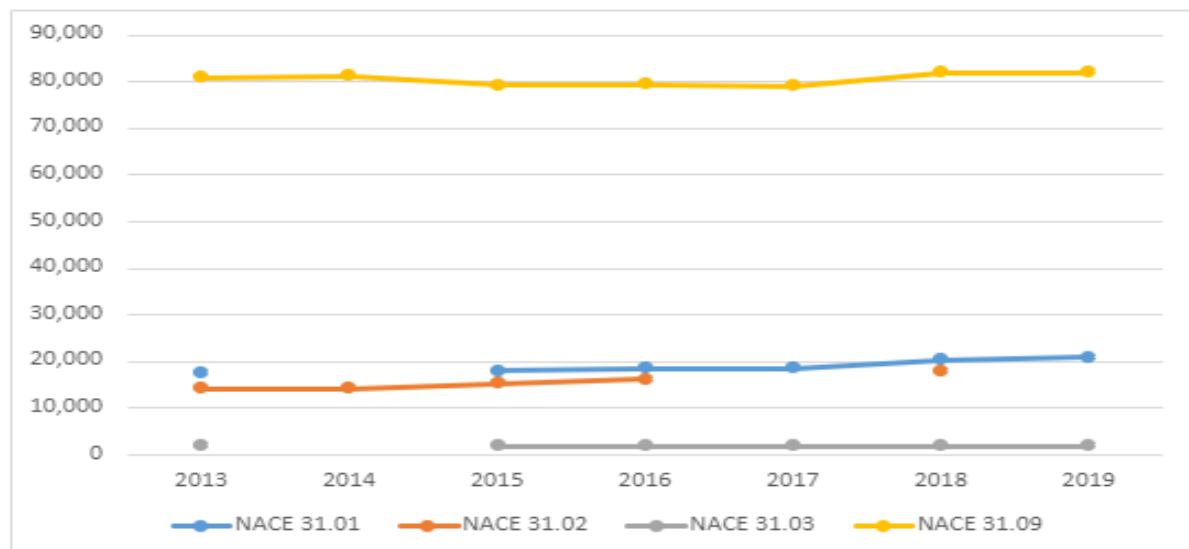
Figure 7: Number of enterprises in the furniture sector in the EU27, 2013–2020



Source: Eurostat, Structural Business Statistics

Most companies operate under NACE 31.09, manufacturing cabinets and home and garden furniture, for example. The second largest subsectors are NACE 31.01 (office and shop furniture) and NACE 31.02 (kitchen furniture). Between 2013 and 2019, the numbers of enterprises in all subsectors were rather stable, at around 80,000 for NACE 31.09, 18,000 for NACE 31.01, 16,000 for NACE 31.02 and 2,000 for NACE 31.03 (Figure 8).

Figure 8: Number of enterprises in the furniture sector, by NACE code, in the EU27, 2013–2019



Note: No data were available for NACE 31.01 for 2014 or for NACE 31.02 for 2017 and 2019.

Source: Eurostat, Structural Business Statistics

According to information provided by the national correspondents, the structure of the sector (in which most companies are microfirms and small firms) determines the scope of activity of entities (Table 8). In Estonia and Greece, companies generally concentrate on one type of activity, while in Italy, Malta and Romania they are engaged in various kinds of activities. However, in many countries, small firms and microfirms concentrate on only one kind of activity (Greece, Latvia, Luxembourg, the Netherlands, Spain), while the bigger ones combine different types of activities (the Netherlands, Poland, Spain). Types of offered products are also diverse. In Bulgaria, for example, microcompanies and small companies produce mainly bedroom, kitchen and office furniture, while mattresses are produced by the large enterprises. In France, the main product groups are office and shop furniture, kitchen and bathroom furniture, and furnishings. Irish companies concentrate on bed, sofa and kitchen manufacturing, while in Finland and Sweden producers are focused mainly on general furniture production.

Table 8: Company characteristics

| Member State | Company characteristics |
|--------------|---|
| AT | Most companies are SMEs. |
| BE | Most companies are microfirms or SMEs. |
| BG | Most companies are SMEs. Companies are mainly domestic ones, but production is export oriented. They usually combine several kinds of furniture activities. Microcompanies and small companies mainly produce bedroom, kitchen or office furniture. The mattress production companies are rather large. |
| CY | Several companies are active in woodworking and furniture activities. Some are active in one specific type of activity, while others combine several kinds of activities. |
| CZ | Several small enterprises and a number of large traditional companies provide individual custom production. |
| DE | The largest group of enterprises operates in NACE 31.09 and 31.01. |
| DK | Within the TMI business association, the main group of enterprises in the furniture sector cooperates in a 'kitchens and furniture' subgroup. |
| EE | Companies generally concentrate on one activity. |
| EL | Most companies are active in NACE 31.09 and one type of activity. |
| ES | Most SMEs specialise in one type of furniture activity. The largest companies cover a wider range of furniture activities. |
| FI | Most of the companies are active in several furniture activities. |
| FR | Most companies are SMEs. The main segments are office and shop furniture, kitchen and bathroom furniture and furnishings – sofas, tables, chairs. Most businesses are heritage businesses with strong roots in their territory. They are mainly concentrated in the Auvergne-Rhône-Alpes (21%) and Île-de-France (11%) regions. |
| HR | Most enterprises are SMEs. |
| HU | Most companies are SMEs. |
| IE | Most of the prominent enterprises are involved in bed, sofa and kitchen manufacturing. The bespoke furniture market is gaining importance. |

| | |
|-----------|--|
| IT | Most enterprises offer different types of products. |
| LT | Most companies operate in NACE 31.09. |
| LU | Companies are generally active in one specific type of furniture activity. |
| LV | Companies are generally active in one specific type of furniture activity. |
| MT | Most local companies combine several kinds of furniture activities. All the major companies are agents for and/or source furniture manufactured by foreign companies. The biggest companies have also branched out into other sectors, for example from bespoke woodwork in the marine sector to providing insulation and soundproofing materials. |
| NL | Most companies are sole proprietorships that are generally active in one specific type of furniture activity. Bigger companies combine several furniture activities. Most companies are interior builders, around 25% are furniture producers or suppliers and the rest are subcontractors/suppliers. |
| PL | Companies in the sector show considerable diversity. Big companies offer different types of products. |
| PT | Most companies operate in NACE 31.09. |
| RO | Most enterprises offer different types of products. |
| SE | Many companies are producers of furniture. |
| SI | Most enterprises are SMEs. |
| SK | Most enterprises are SMEs and operate in NACE 31.09 and 31.02. |

Note: *SMEs, small and medium-sized enterprises.*

Source: *Network of Eurofound Correspondents' national contributions to this study, 2021*

The furniture sector faces specific problems and challenges in different countries. According to the national correspondents, in Croatia and France companies are facing growing foreign competition. In Croatia, small companies face the challenge of competing effectively in the market. Responding to this challenge, entrepreneurs established the Wood Cluster, consisting of producers, regional and local development agencies, three specialised tertiary educational institutions and several scientific centres. However, production volumes have fallen by more than 40% over the last 15 years in France, but since 2015 the sector has benefited from a rebound driven by the 'made in France' initiative, which has stabilised the volumes. Nevertheless, the number of companies decreased from 2015 to 2018 due to the continued concentration of companies. In contrast, the Hungarian furniture industry has grown over the past 5–10 years, in both the medium-sized and large firms' segments. The reasons for this growth were an increase in state home subsidies and home renovation subsidies, new restaurant openings and an increase in exports. The President of the Furniture and Wood Processing Association at the Chamber of Commerce and Industry of Slovenia is positive, and believes that the wood-processing industry, and as a result also forestry, can become one of the fastest-growing industries in Slovenia. However, added value per employee in the furniture sector is lower than in the woodworking sector. Since there is a lot of handwork and the costs of work are very high, companies invest more in work than in development. In Greece, two problems were emphasised, the first concerning lack of coverage of employees by social security funds in case of illness and the second concerning lack of corresponding vocational education in the professions and specialties. According to the national correspondent, most professionals in the Greek furniture sector are practically trained on the job.

The furniture sector is strictly regulated by law in terms of noise emissions, especially for urban areas (Table 9). There are also regulations preventing workers from being exposed to wood dust or other harmful substances and gases. Complying with regulations requires many manufacturers to make enormous investments, including moving businesses outside cities or to industrial zones.

Table 9: Impact of noise and other occupational regulations on companies

| Member State | Impact of noise and other occupational regulations on companies |
|--------------|--|
| AT | There are noise limits for residential areas. Some companies have had to make enormous investments to comply with regulations. There are also regulations on wood dust exposure for the furniture sector. |
| BE | Employers are obligated to protect workers from physical agents such as low or high temperatures, noise, vibrations and chemical substances. |
| BG | The sector is well regulated, and companies pay specific attention to occupational health and safety. |
| CY | Most companies in the sector have had to move outside the cities due to legal regulations on noise limits. |
| CZ | There are regulations to protect health against the adverse effects of noise and vibration. The release of formaldehyde from materials and furniture indoors is controlled in the furniture industry by law. |
| DE | Noise pollution is regulated at national level. |
| DK | There are many regulations and executive orders that affect companies in the sector. |
| EE | Noise levels for the industry are regulated by law. |
| EL | Most professional workshops are characterised by low levels of harassment, and it is relatively easy to license them. |
| ES | Noise emissions are regulated by law, especially for companies operating close to urban centres. |
| FI | There are regulations concerning noise and wood dust exposure. |
| FR | No data. |
| HR | There are no national/local regulations related to noise prevention impacting the companies in the sector. |
| HU | No data. |
| IE | There are regulations concerning noise and wood dust exposure. |
| IT | There are regulations concerning noise and wood dust exposure. |
| LT | No research or study results are available on the impact of national/local regulations related to noise prevention for companies in the sector. |
| LU | Employers must ensure the safety and protect the health of their employees in all aspects related to work. Employers must draw up risk inventories for all workstations. |
| LV | Noise emission is regulated by law. |
| MT | According to regulations, all commercial activities must not cause annoyance by way of noise. To limit noise pollution, the largest furniture manufacturers are situated within industrial zones. There are noise regulations covering all furniture enterprises operating within residential areas. |
| NL | There is no evidence of noise prevention being a big issue in the Netherlands for this sector. Waste management and recycling are a more relevant topic. |

| | |
|-----------|--|
| PL | Enterprises already comply with noise standards through modernisation. There are regulations on the chemical composition of applied varnishes, foams or wood-based panels. National standards are strict, exceeding those in western Europe. |
| PT | Noise emission is regulated by law. |
| RO | Noise emission is regulated by law. |
| SE | There are regulations concerning noise, wood dust and airborne pollutants such as other dusts, gases and vapours. |
| SI | There is general legislation related to noise prevention. |
| SK | Noise emission is regulated by law. |

Source: *Network of Eurofound Correspondents' national contributions to this study*

As noted above, most companies in the furniture sector are microcompanies and small companies. In many countries, this is perceived as a barrier to organising employers in the sector (Belgium, Croatia, Czechia, France, Latvia, Malta, Poland,⁴ Portugal) (Table 10). In contrast, there are also countries reporting that there are no constraints in organising companies in the sector or there are no specificities in the furniture sector making the organisation of employers particularly difficult or easy (Cyprus, Denmark, Estonia, Finland, Italy, the Netherlands, Slovakia, Slovenia). In the case of Bulgaria and Estonia, it is rather easy to organise the sector. Some correspondents indicated that sole proprietorships are hard to organise, as in the case of Czechia and Spain. In Sweden, however, this does not seem to be a problem, and lots of self-employed people are organised in TMI.

Table 10: Impact of company specificities on organising employers

| Member State | Impact of company specificities on organising employers |
|---------------------|---|
| AT | Federal Economic Chamber (WKO) membership is mandatory for all sectoral companies. |
| BE | The dominance of SMEs in the sector makes it hard for companies to organise. |
| BG | The specificities of the companies make it easy for employer organisations/business associations to organise the sector. |
| CY | There are no difficulties in organising employers and companies in the sector. |
| CZ | The high proportion of small firms and self-employed people makes the sector hard to organise. |
| DE | Medium-sized and large companies are easier to organise. |
| DK | There are no specificities that make the organisation of employers particularly difficult or easy. The larger the company, the more frequently the employees are covered by collective bargaining agreements. |
| EE | It is rather easy to organise the sector. |
| EL | The small and very small enterprises are usually organised in a federation, POVSKX, which is a member of the GSEVEE confederation, while bigger companies are not organised. |

⁴ In countries where there is little (or no) social dialogue or collective bargaining, being a microcompany or a small company can be perceived as a barrier to becoming a member of an employer organisation.

| | |
|----|---|
| ES | Self-employed people are harder to organise. |
| FI | There are no specificities that make the organisation of employers particularly difficult or easy. |
| FR | Most companies are microcompanies. The structure of the sector makes it hard for companies to organise. |
| HR | Most companies are small or medium-sized. This makes the sector hard to organise. |
| HU | The sector is difficult to organise as most companies do not see the advantages of joining an employer organisation. |
| IE | There does not seem to be much coordination among employers, at least in a formal sense. |
| IT | There are no specificities that make the organisation of employers particularly difficult or easy. |
| LT | Medium and large enterprises, employing the majority of sectoral employees, are rather well organised. |
| LU | There is no employer organisation/business association in the sector. |
| LV | Microfirms are more difficult to organise. |
| MT | Most businesses are small and family run. This makes the sector hard to organise. |
| NL | There are a lot of small companies in the sector, but this does not seem to make it difficult for employers/business organisations to organise the sector. This is because they see employer organisations as the SMEs' headquarters, where they can find support and advice. |
| PL | Large companies are easier to organise. The main barrier is the reluctance to engage in collective bargaining. |
| PT | Most businesses are small. This makes the sector hard to organise. |
| SE | There are many sole proprietorships in the sector, although a lot of them are organised through the TMF. |
| SI | There are no specificities that make the organisation of employers particularly difficult or easy. |
| SK | There are no specificities that make the organisation of employers particularly difficult or easy. |

Note: *SMEs, small and medium-sized enterprises. Romania is not included as there are no data on the difficulties or requirements regarding the organisation of companies.*

Source: *National contributions to this study*

Positive outlooks in terms of organising employers were presented by Bulgarian and Greek correspondents. In Bulgaria, the Branch Chamber of Woodworking and Furniture Industry, which is recognised as the major sector-level organisation, provides a range of services to its member companies. The members have been represented for years, and receive not only assistance in their market activities but also information on innovation and technologies concerning the sector. Thus, it can be said that the business interests of companies are the main reason for joining the chamber. On the other hand, the National Association of Wood Products Companies represents microcompanies. The association presents its members' concerns to the authorities and defends their interests. In the case of Greece, the business organisations work together, and cooperation is very good. The level of competition between the companies, which are export-oriented, is currently rather low; however, it is in their mutual interest to be competitive to strengthen their exports.

Table 11 presents the share of the sectoral workforce employed in the three largest companies in each country and the average workforce size per country. In Austria, Denmark, Finland, Latvia and Slovakia,

around 10% of the sectoral workforce is concentrated in the largest company. Latvia and Slovakia are countries where a relatively big portion of the sectoral workforce is concentrated in the three largest enterprises. For Slovakia, 13.41% are in the largest company, 9.19% in the second largest and 7.50% in the third largest, whereas for Latvia the proportions are 10.23%, 9.68% and 7.08%. In most of the Member States, the concentrations in each of the three largest companies vary between around 0.5% and 7%. The furniture sector within the EU is rather fragmented.

Table 11: Sectoral workforce in the largest companies

| MS | Number of sector-related employees in the largest company in the sector | % of the sectoral workforce in the largest company | Number of sector-related employees in the second largest company | % of the sectoral workforce in the second largest company | Number of sector-related employees in the third largest company | % of the sectoral workforce in the third largest company | Average workforce size ⁵ |
|-----------------|---|--|--|---|---|--|-------------------------------------|
| AT | 2,500 | 9.19 | 800 | 2.94 | 730 | 2.68 | 8.65 |
| BE | 208 | 1.58 | 135 | 1.03 | 130 | 0.99 | 5.54 |
| BG | 570 | 2.43 | 510 | 2.17 | 396 | 1.69 | 9.96 |
| CY | 50 | 4.63 | 50 | 4.63 | 35 | 3.24 | 3.54 |
| CZ | 600 | 2.44 | 200 | 0.81 | 150 | 0.61 | 4.44 |
| DE | n.d. | n.d. | 1,855 | 1.21 | 1,300 | 0.85 | 14.12 |
| DK | 902 | 9.42 | 658 | 6.87 | 419 | 4.38 | 14.68 |
| EE | 244 | 3.20 | 230 | 3.02 | 211 | 2.77 | 9.54 |
| EL | 250 | 2.08 | 50 | 0.42 | n.d. | n.d. | 3.43 |
| ES | 563 | 0.93 | 373 | 0.62 | 335 | 0.55 | 5.48 |
| FI | 740 | 10.49 | 400 | 5.67 | 280 | 3.97 | 8.72 |
| FR | 1,770 | 3.88 | 1,700 | 3.73 | 600 | 1.32 | 3.90 |
| HR | 450 | 3.90 | 250 | 2.17 | 200 | 1.73 | 10.27 |
| HU | 857 | 4.39 | 609 | 3.12 | 560 | 2.87 | 6.05 |
| IE | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| IT | 2,100 | 1.60 | 1,000 | 0.76 | 700 | 0.53 | 7.94 |
| LT | 1,150 | 3.68 | 930 | 2.97 | 850 | 2.72 | 13.46 |
| LU ⁶ | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | 6.85 |
| LV | 659 | 10.23 | 624 | 9.68 | 456 | 7.08 | 7.70 |

⁵ Average workforce size was calculated by dividing the number of people employed in the furniture sector by the number of enterprises in the furniture sector.

⁶ The furniture sector in Luxembourg is insignificant.

| MS | Number of sector-related employees in the largest company in the sector | % of the sectoral workforce in the largest company | Number of sector-related employees in the second largest company | % of the sectoral workforce in the second largest company | Number of sector-related employees in the third largest company | % of the sectoral workforce in the third largest company | Average workforce size ⁵ |
|----|---|--|--|---|---|--|-------------------------------------|
| MT | 50–200 | 3.92–15.63 | 10–49 | 0.78–3.84 | n.d. | n.d. | 2.82 |
| NL | 700 | 2.73 | 300 | 1.17 | 170 | 0.66 | 2.67 |
| PL | ±10,000 | 4.82 | 8,400 | 4.05 | 3,500 | 1.69 | 9.21 |
| PT | >1,000 | >2.92 | 678 | 1.98 | 677 | 1.98 | 7.64 |
| RO | 4,368 | 7.16 | 2,008 | 3.29 | 1,400 | 2.29 | 13.90 |
| SE | 781 | 4.93 | 266 | 1.68 | 225 | 1.42 | 4.14 |
| SI | 406 | 6.50 | 283 | 4.53 | 100–150 | 1.61–2.40 | 5.34 |
| SK | 1,812 | 13.41 | 1,242 | 9.19 | 1,014 | 7.50 | 12.11 |

Notes: MS, Member State; n.d., no data.

Sources: National contributions to this study; Eurostat, *Structural Business Statistics*, 2019

1.3. Specificities of the furniture sector

The European furniture sector has a significant share in the global furniture market. Germany, Italy and Poland are particularly important players. The furniture turnover values in these countries are among the highest in the world, right behind China and the United States. These three countries are also among the world's largest furniture exporters, second only to China. On the other hand, China is the largest furniture exporter to the EU. Therefore, the European furniture sector faces the enormous challenge of competing with Chinese exports, which have low production costs. India, with its cheap products, is increasingly a competitor for the European furniture market. According to the European Commission, another serious problem facing the sector is its ageing workforce. Difficulties in attracting young workers may lead to disruptions in maintaining skilled workers and craft skills in the sector (European Commission, undated).

The furniture sector made ambitious commitments to tackle climate and environment-related challenges to achieve a climate-neutral economy by 2050 (the European Green Deal). One of them is to reduce the amount of furniture waste through circular economy initiatives. According to European Furniture Manufacturers Federation (UEA) statistics, furniture waste in the EU accounts for more than 4% of the total municipal solid waste stream. Waste from commercial sources is assumed to contribute 18% of total furniture waste generation across the sector (Furn360, 2018). Eurostat statistics show that, in general, the bigger the country and the larger the furniture market as a proportion of the economy, the higher the volume of furniture waste. This means that Germany, Italy and Poland, together with France and Spain, are responsible for a large amount of the furniture waste generated in the EU (European Environmental Bureau, 2017). This is a serious problem that should be solved rapidly. In the Netherlands (the sixth largest furniture waste producer) for example, the sector has been working on extended producer responsibility schemes to improve the circularity of mattresses. Such schemes

would require mattress producers to set up and operate recycling programmes that make it easy for consumers to recycle old mattresses and would relieve local governments of the burden of managing this type of bulky waste.⁷ There is also a new initiative called Wood Loop, where wood waste is collected and transported back to the panel manufacturer, which then makes new panels from the wood waste, thus creating a circular ‘wood loop’ that diminishes CO₂ emissions.

It must also be emphasised that 2020–2022 were very challenging years for the furniture industry due to the COVID-19 pandemic. According to EFIC’s 2020 annual report, the pandemic caused disruptions in the supply chain, reduced working times and the cancellation of many trade fairs and exhibitions, leading to reduced demand, production, imports and exports. Additionally, because of the high interdependency on other countries, both EU and non-EU, many companies experienced shortages of supplies of raw materials, components and semi-finished products, which led to disruptions in production, delays in deliveries and often penalties (EFIC, 2021). What is more, the prices of raw materials went up by 30–70% (Hello Vidék, 2021). Nevertheless, during the COVID-19 pandemic, entrepreneurs discovered opportunities for foreign expansion through e-commerce. For example, in Germany in the third quarter of 2020, online sales of furniture grew by 13.3%. What is more, some segments of the furniture industry grew during the pandemic. According to data provided by national correspondents, in Hungary, for example, the impact of COVID-19 was very slightly negative or even positive in the furniture sector. The state offered subsidies for home renovation, which was permitted even during the lockdowns. The fact that a lot of people were forced to work from home during the pandemic increased the demand for home renovations. For example, kitchen sales went up by 15%, probably because more people were forced to cook during the lockdowns. Gardens and balconies were also revamped as people sought to better cope with more time spent at home.

Since February 2022, the European markets have been facing additional serious disruptions because of the Russian invasion of Ukraine, which destabilised the supply chains of many products in Europe, including wood and wood products for the furniture sector. In 2018, Germany, Poland and Romania were the main trade partners of Ukraine in terms of the export values of wood and articles of wood. Poland, for example, imported 25% of its wood from Belarus, 10% from Ukraine and 5% from Russia (Magazyn Biomasa, 2022). What is more, Russia is the largest lumber exporter globally and ranks as the seventh biggest exporter of forest products worldwide. According to Wood Resources International LLC, it is highly probable that increased sanctions against trading with Russia and difficulty with financial transactions will interrupt and redirect shipments of forest products throughout the world, including in the EU (Canadian Forest Industries, 2022).

The abovementioned challenges are only the main ones of the many facing the furniture sector. Others are rising labour and energy costs, consumer demand for sustainable and customised products and unfair trade practices concerning property rights.

1.4. Industrial relations in the furniture sector

Figure 6 illustrated that 88.5% of all furniture sector companies have fewer than 10 employees. Together with the 6.1% of companies with 10–19 employees, 94.6% of all sectoral companies have fewer than 20 employees. Table 11 illustrated that in half of the EU Member States the three largest

⁷ Information provided by the national correspondent.

furniture sector companies employ between 5% and 10% of the national sectoral workforce. In six Member States, the three largest companies employ between 10% and 15% of the national sectoral workforce and in seven Member States the largest three employ between 2% and 5% of the national sectoral workforce. In this sectoral setting dominated by small companies, the coverage of sectoral collective bargaining depends on the support of mechanisms to make sectoral collective bargaining agreements generally binding for all companies and all employees in the sector.

Table 12 presents the industrial relations setting in terms of the coverage of collective bargaining shaping working conditions in the sector, while Table 13 illustrates the capacity to mobilise and the membership strength of the trade unions. Table 14 gives country-by-country density rates for the trade unions in the furniture sector. Table 15 gives country-by-country density rates for the sectoral employer organisations in terms of number of organised companies and the proportion of the sectoral workforce they employ, based on the information that was made available. It should be underlined that this information was incomplete.

Table 12: Collective bargaining coverage and extension mechanisms

| MS | % of sectoral workforce covered by CB (SEB and MEB) | % covered by MEB | Proportion of the workforce in the largest company as a % of the sectoral workforce (with SEB) | Existence of a mechanism making CB agreements in the country generally binding | Existence of an extension mechanism in the furniture sector covering all workers with CB | Existence of criteria for inclusion in the extension mechanism | Existence of requirements/ criteria for taking part in SEB | Bipartite or tripartite SD body in the sector | |
|----|---|------------------|--|--|--|--|--|---|-----|
| | | | | | | | | Bi | Tri |
| AT | 100 | 100 | No SEB | Yes | Yes ⁸ | Yes | Yes | No | No |
| BE | 100 | 100 | 1.93 | No ⁹ | No ¹⁰ | n.d. | No | Yes | No |
| BG | 1 | 0 | No SEB | Yes | No | Yes | No | No | No |
| CY | 42 | 35 | 5.4 | No | No | No | No | No | No |
| CZ | 5.5 ¹¹ | n.a. | 3.0 | Yes | No | Yes | No | No | No |
| DE | 28 ¹² | 28 ¹³ | No SEB | Yes | No | No | No | No | Yes |
| DK | 80–90 ¹⁴ | 80 ¹⁵ | n.d. | No | No | No | No | Yes | No |
| EE | n.a. | n.a. | n.d. | Yes | No ¹⁶ | No | No | No | No |

⁸ The extension is of no relevance in the sector because all companies and employees in the sector are covered by collective agreements through compulsory membership of the WKO and its sectoral subunits.

⁹ There is no automatic mechanism but it is a general practice.

¹⁰ There is no automatic mechanism but it is a general practice.

¹¹ 1,100 employees.

¹² Estimated data.

¹³ Estimated data.

¹⁴ Estimated number; combined with the woodworking sector.

¹⁵ Estimated number; combined with the woodworking sector.

¹⁶ There are no collective agreements in the sector.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | | | |
|----|-------|-------|--------|-------------------|-------------------|------|-------------------|------|------|
| EL | n.a. | n.a. | n.d. | Yes | Yes ¹⁷ | Yes | No | No | No |
| ES | 100 | 60–65 | No SEB | Yes | Yes | Yes | Yes | No | No |
| FI | 70 | 70 | No SEB | Yes | No | Yes | Yes | Yes | No |
| FR | 100 | 100 | 4.45 | Yes | Yes | Yes | Yes | Yes | No |
| HR | 15 | n.d. | No SEB | Yes | Yes | Yes | No | No | No |
| HU | 8 | 8 | No SEB | Yes | No | Yes | Yes | No | No |
| IE | n.d. | n.d. | n.d. | No | No | No | No | n.d. | n.d. |
| IT | 100 | 100 | 1.93 | No | No | No | No | Yes | No |
| LT | 36 | 30 | No SEB | Yes | No | No | No | No | No |
| LU | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| LV | 2 | 0 | No SEB | Yes | No | Yes | No | No | Yes |
| MT | 2.5 | 0 | No SEB | Yes | No | Yes | Yes | No | No |
| NL | 60 | 60 | No SEB | Yes | Yes | Yes | Yes ¹⁸ | Yes | Yes |
| PL | 0 | 0 | No SEB | Yes ¹⁹ | Yes | Yes | No | No | No |
| PT | 100 | 100 | No SEB | Yes | Yes | No | No | No | No |
| RO | 80 | 0 | 7.26 | Yes | No | No | Yes | Yes | No |
| SE | 90 | 90 | No SEB | No | No | No | No | No | No |
| SI | 70 | 70 | 7.44 | Yes | No | Yes | Yes | No | No |
| SK | 10–15 | 5 | 14.25 | Yes | Yes | No | No | No | Yes |

Notes: CB, collective bargaining; MEB, multi-employer bargaining; MS, Member State; n.a., not applicable; n.d., no data; SD, social dialogue; SEB, single-employer bargaining.

Sources: National contributions to this study; Eurostat, Structural Business Statistics, 2019

Table 13: Capacity of trade unions to mobilise members in the sector in recent years

| Member State | Capacity of trade unions to mobilise members in the sector in industrial actions in recent years |
|--------------|---|
| AT | |
| BE | |
| BG | The FLI Podkrepa participated in national protests organised by the Confederation of Labour Podkrepa. A protest relating to paid sick leave took place in 2019, while a protest against the lack of regulation on overtime and the summarised calculation of working hours was organised in 2020. |

¹⁷ Answer refers only to company-level collective bargaining.

¹⁸ Not formally established.

¹⁹ This mechanism has never been used in any sector.

| | |
|----|---|
| CY | |
| CZ | OS DLV: According to the <i>Report on Collective Bargaining, CMKOS</i> , there have been strike preparedness announcements regarding the support of a conclusion of a company collective agreement in recent years (one in 2018, three in 2019 and two in 2020). It is not known which subsector the announcements related to. |
| DE | IG Metall organised strikes during the collective bargaining round in 2021 in the industry. |
| DK | |
| EE | |
| EL | |
| ES | |
| FI | In 2020, Teollisuusliitto organised a strike in the woodworking sector (mechanical forest industry), and this strike was later extended to cover some parts of the furniture sector. |
| FR | |
| HR | |
| HU | |
| IE | |
| IT | On 21 February 2020, all three trade unions took part in a strike for the renewal of the woodworking national sectoral collective agreement. |
| LT | |
| LU | |
| LV | |
| MT | |
| NL | FNV organised industrial action concerning pensions. |
| PL | ZZ Budowlani organised protests regarding disputes on rules for granting seniority bonuses and company pension plans. |
| PT | |
| RO | In 2019, FSLIL was involved, along with other trade union federations, in a protest about the negotiations on Law 62/2011 on social dialogue. |
| SE | |
| SI | |
| SK | |

Note: The lack of data for several countries indicates that trade unions in those countries did not demonstrate their capacity to mobilise members to engage in industrial action or protests over the previous two to three years. In other cases, industrial action is very rare or unions could not find concrete cases.

Sources: National contributions to this study; Eurostat, *Structural Business Statistics, 2019*

Table 14: Organisational density of trade unions in the furniture sector

| Member State | Number of sectoral employees | Number (%) of trade unions covered by data | Number of trade union members in the sector | Density based on trade union data (%) |
|--------------|------------------------------|--|---|---------------------------------------|
| AT | 24,258 | All (100) | n.d. | 90 |
| BE | 10,767 | 2 out of 3 (67) | 6,496 | 60 |
| BG | 21,587 | All (100) | 373 | 2 |
| CY | 926 | All (100) | 150 | 16 |
| CZ | 19,994 | All (100) | 605 | 3 |
| DE | 142,105 | All (100) | 12,000 | 8 |
| DK | 9,323 | All (100) | 7,650 | 82 |
| EE | 7,413 | 0 | n.d. | n.d. |
| EL | 8,429 | All (100) | 1,075 | 13 |
| ES | 52,624 | 1 out of 3 (33) | 4,137 | 8 |
| FI | 6,573 | All (100) | 2,600–4,600 | 40–70 |
| FR | 39,734 | 2 out of 5 (40) | 2,763 | 7 |
| HR | 11,134 | All (100) | 420 | 4 |
| HU | 17,119 | All (100) | 250 | 1 |
| IE | n.d. | All (100) | <1,000 | n.d. |
| IT | 108,715 | 0 | n.d. | n.d. |
| LT | 30,358 | All (100) | About 1,250 | About 4 |
| LU | 177 | 0 | n.d. | n.d. |
| LV | 6,270 | All (100) | 120 | 2 |
| MT | 872 | All (100) | 30 | 3 |
| NL | 18,090 | All (100) | n.d. | 9–10 |
| PL | 186,886 | All (100) | 3,300 and less than half of 2,300 ²⁰ | About 2 |
| PT | 31,738 | All (100) | About 1,167 | 4 |
| RO | 60,188 | All (100) | 6,820 and 0.16% | 11 |
| SE | 14,063 | All (100) | 2,035 and about 60% | About 74 |
| SI | 5,457 | All (100) | 200 and 40–60% | 44–64 |
| SK | 12,712 | All (100) | 600–800 | 5–6 |

Notes: Numbers of trade union members in Belgium and Greece cover both the furniture sector and the woodworking sector, so the trade union density in these countries is overestimated. In Denmark, trade union 3F is a member of CO-industri (Central Organisation of Industrial Employees in Denmark). In Ireland, the number of trade union members was not available. n.d., no data.

Sources: Eurostat, Structural Business Statistics, 2019; Network of Eurofound Correspondents' national contributions to this study

²⁰ In the case of ZZ Budowlani, the number includes employees in the woodworking sector.

Table 15: Organisational density of employer organisations in the furniture sector

| Member State | Number of companies in the sector | Employer organisations covered by data | Companies covered by employer organisations | % of companies covered by employer organisations | Density in terms of workforce of organised companies (%) |
|--------------|-----------------------------------|--|---|--|--|
| AT | 3,146 | 3 out of 4 | 10,956 ²¹ | n.d. | 2 ²² |
| BE | 2,376 | 2 out of 2 | 350 and 1,038 ²³ | 14.73 ²⁴ | n.d. |
| BG | 2,357 | 2 out of 2 | 275 | 11.67 | 1 ²⁵ |
| CY | 305 | 1 out of 1 | 36 | 11.80 | 42 |
| CZ | 5,539 | 1 out of 1 | 61 | 1.10 | 30 |
| DE | 10,826 | 2 out of 3 | 1,075 | 9.93 | 84 ²⁶ |
| DK | 652 | 2 out of 2 | 150 ²⁷ | 23.01 | 75 |
| EE | 799 | 2 out of 2 | 32 | 4.0 | 20.23 ²⁸ |
| EL | 3,497 | 1 out of 1 | 1,125 | 32.17 | n.d. |
| ES | 11,052 | 6 out of 7 | 227 and 23,300 ²⁹ | 2.05 ³⁰ | 15 ³¹ |
| FI | 809 | 1 out of 2 | <100 | <12.36 | n.d. |
| FR | 11,699 | 2 out of 2 | 519 ³² | 4.44 | 66.4 |
| HR | 1,122 | 2 out of 2 | 407 | 36.27 | 70–75 |
| HU | 3,229 | 1 out of 1 | 33 | 1.02 | 2.46 |
| IE | n.d. | 1 out of 1 | 73 | n.d. | 10–12 |
| IT | 16,505 | 1 out of 6 | 39 ³³ | n.d. | 20 ³⁴ |

²¹ For BITH, data also include the woodworking sector (10,886 companies in total).

²² Data only for FVTI.

²³ 1,038 is the number of employees covered by Houtunie Houtbewerkers.

²⁴ Only for Fedustria.

²⁵ Data only for the National Association of Wood Products Companies.

²⁶ Data only for VDM.

²⁷ TMI is part of DI so companies covered by TMI are included in companies covered by DI.

²⁸ Data only for EMTL.

²⁹ 23,300 is the number of companies in UNEmadera covering the furniture, woodworking and packaging sectors.

³⁰ Companies associated with UNEmadera (companies covering the furniture, woodworking and packaging sectors) and Fevama (no data) were not included in the calculations.

³¹ Data only for AMC.

³² Data for UNAMA from 2017.

³³ Data for FLA, including the woodworking sector.

³⁴ Data for FLA.

| | | | | | |
|----|--------|------------|----------|-----------|--------------------|
| LT | 2,323 | 1 out of 1 | 30–40 | 1.29–1.72 | 30 |
| LU | 26 | n.a. | n.a. | n.a. | n.a. |
| LV | 837 | 1 out of 1 | 15 | 1.79 | 40 |
| MT | 452 | 2 out of 2 | 4 | 0.88 | 23.3 ³⁵ |
| NL | 9,603 | 1 out of 1 | Over 520 | 5.41 | 60 |
| PL | 22,551 | 1 out of 1 | 163 | 0.72 | 10 |
| PT | 4,479 | 2 out of 2 | 382 | 8.53 | 26.78 |
| RO | 4,391 | 1 out of 1 | 216 | 4.92 | 43.88 |
| SE | 3,824 | 1 out of 1 | 143 | 3.74 | 85 |
| SI | 1,169 | 2 out of 2 | 1,052 | 90 | 70 |
| SK | 1,116 | 1 out of 1 | 16 | 1.43 | 5–10 |

Notes: *There are no employer organisations in Luxembourg. n.a., not applicable; n.d., no data.*

Sources: *National contributions to this study; Eurostat, Structural Business Statistics, 2019*

In 20 countries there is a general mechanism making collective bargaining agreements generally binding, but only in 9 Member States does the extension mechanism in the furniture sector cover all employees. The reasons for this are mostly related to specific requirements that must be met for employees to be covered by the extension mechanism. In Czechia for example, employers (and their employees) whose predominant business activity is in a different sector are excluded. Other exclusion criteria cover companies with fewer than 20 employees, companies with more than 50% of workers with disabilities, enterprises in bankruptcy, those affected by an extraordinary natural event or those covered by a high-level collective agreement. In Bulgaria, the extension is not automatic but may cover all companies and workers in the sector on request of the signatories of the agreement. When receiving the social partners' requests, the Minister of Labour and Social Policy decides whether to extend the agreement or some of its clauses to all sectoral companies. A similar rule is valid in Lithuania, where the application of individual provisions of a national (cross-sectoral), territorial or sectoral (industry, professional services) collective agreement may be compulsorily extended by order of the Minister of Social Security and Labour to cover all employers in a certain territory or sector if both parties to the collective agreement submit a proposal for this in writing. Other requirements were implemented in Finland, where employers that are unorganised in terms of collective bargaining must comply with the national agreements relevant for their type of business. The main criterion for a collective agreement to be considered generally applicable is that more than half of the employees in the sector work for employers that are signatories – or, more frequently, members of an employer organisation that is a signatory – of the agreement. In Italy, national collective agreements apply only to enterprises and workers associated to signing parties; however, there is a jurisprudential procedure that extends minimum pay rates set by national collective agreements to workers and companies not affiliated to the signatory organisations. This is done in accordance with Article 36 of the Italian Constitution, which

³⁵ Estimated data.

states that workers must be guaranteed a salary that is sufficient and able to assure the worker and their family a free and dignified existence.

When considering the capacity of trade unions to mobilise members in the sector in recent years, we can conclude that trade unions in more than 60% of countries did not take part in any protests. Reasons for protests in some Member States were presented in Table 13.

As indicated in Table 14, organisational density of trade unions in the furniture sector varies significantly between countries, ranging from 1% in Hungary to 90% in Austria. Most countries reported the number of members of all sector-related trade unions, but in many cases these are only rough estimates or apply to both the furniture sector and the woodworking sector. In only four cases (Czechia, Germany, Latvia and Malta), the data refer to all trade unions in the country and the number of affiliated members is the exact number drawn from a database of trade union members.

In Table 15, the organisational density of employer organisations/business associations in the furniture sector was presented. As can be seen, the highest densities were noted in Sweden, Germany, Denmark, Croatia and Slovenia. The lowest was in Hungary. In some cases, estimation of density in particular employer organisations/business associations was hard due to aggregated data for more than one sector.

2. National level of interest representation

This chapter presents an overview of the national-level trade unions and employer organisations active in the furniture sector. The Network of Eurofound Correspondents identified 57 sector-related trade unions and 52 sector-related employer organisations in the EU27. In both cases, there is an average of two per Member State, as indicated in blue in Table 16. The green cells indicate the number of trade unions (on the left) and the number of organisations representing employers (on the right). An alphabetical list of all national organisations, with their abbreviations and full names, can be found in Annex 1.

Table 16: Number of trade unions/employer organisations in the furniture sector

| Number of trade unions | | | | | | | Member State | Number of employer organisations/business associations | | | | | | | | |
|------------------------|--|--|--|--|--|----|--------------|--|--|--|--|--|--|--|--|--|
| | | | | | | 2 | AT | 4 | | | | | | | | |
| | | | | | | 3 | BE | 2 | | | | | | | | |
| | | | | | | 2 | BG | 2 | | | | | | | | |
| | | | | | | 4 | CY | 1 | | | | | | | | |
| | | | | | | 1 | CZ | 1 | | | | | | | | |
| | | | | | | 1 | DE | 3 | | | | | | | | |
| | | | | | | 2 | DK | 2 | | | | | | | | |
| | | | | | | 1 | EE | 2 | | | | | | | | |
| | | | | | | 1 | EL | 1 | | | | | | | | |
| | | | | | | 3 | ES | 7 | | | | | | | | |
| | | | | | | 2 | FI | 2 | | | | | | | | |
| | | | | | | 5 | FR | 2 | | | | | | | | |
| | | | | | | 2 | HR | 2 | | | | | | | | |
| | | | | | | 1 | HU | 1 | | | | | | | | |
| | | | | | | 1 | IE | 1 | | | | | | | | |
| | | | | | | 3 | IT | 6 | | | | | | | | |
| | | | | | | 2 | LT | 1 | | | | | | | | |
| | | | | | | 2 | LU | 0 | | | | | | | | |
| | | | | | | 1 | LV | 1 | | | | | | | | |
| | | | | | | 1 | MT | 2 | | | | | | | | |
| | | | | | | 2 | NL | 1 | | | | | | | | |
| | | | | | | 2 | PL | 1 | | | | | | | | |
| | | | | | | 2 | PT | 2 | | | | | | | | |
| | | | | | | 2 | RO | 1 | | | | | | | | |
| | | | | | | 4 | SE | 1 | | | | | | | | |
| | | | | | | 4 | SI | 2 | | | | | | | | |
| | | | | | | 1 | SK | 1 | | | | | | | | |
| | | | | | | 57 | EU27 | 52 | | | | | | | | |

Note: Blue shading denotes the average number of organisations per country.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

In all Member States there is at least one trade union in the furniture sector, but most often workers in the furniture sector are represented by two trade unions. France records the highest number of trade unions in this sector (five). The number of employer organisations per country varies between zero and seven. Luxembourg does not have a sector-related employer organisation. Most often, workers in this sector are represented by one employer organisation. The highest numbers of employer organisations can be found in Spain and Italy (Table 16).

2.1. National trade union membership domain and strength

Tables 17–19 contain data representing the width of national trade union coverage in terms of NACE codes and occupational categories. Most trade unions cover workers from more than one NACE code and occupational category. Of the 57 trade unions active in the sector, 34 (60%) organise workers in all six NACE codes in the furniture sector. Seven trade unions cover workers from only one NACE code. Thirty-five (61%) trade unions organise workers in all four occupational categories, whereas 10 trade unions organise workers in only one category.

Table 17: Trade unions, by type of sector coverage

| | NACE 31.01 | NACE 31.02 | NACE 31.03 | NACE 31.09 (home furniture) | NACE 31.09 (garden furniture) | NACE 31.09 (cabinets) | Self-employed | Blue collar | White collar | Management staff |
|---|------------|------------|------------|-----------------------------|-------------------------------|-----------------------|---------------|-------------|--------------|------------------|
| Number (%) of trade unions with NACE code/occupational category coverage | 45 (79) | 42 (74) | 40 (70) | 53 (93) | 46 (81) | 46 (81) | 4 (7) | 51 (89) | 47 (82) | 35 (61) |
| Number of Member States with NACE code/occupational category coverage by at least one trade union | 23 | 19 | 18 | 26 | 20 | 21 | 4 | 27 | 23 | 16 |

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 18: Width of trade union coverage

| | Number of NACE codes covered | | | | | | | |
|------------------------|---|----|---|---|-------------------|---|-------------------|---------|
| | 0 | 1 | 2 | 3 | 4 | 5 | 6 (full coverage) | No data |
| Number of trade unions | 0 | 7 | 3 | 4 | 2 | 6 | 34 | 1 |
| | Number of occupational categories covered | | | | | | | No data |
| | 0 | 1 | 2 | 3 | 4 (full coverage) | | | |
| Number of trade unions | 0 | 10 | 8 | 2 | 35 | 2 | | |

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 19: Width of membership domains of sectoral trade unions

| MS | Trade union | Parts of the sector organised | | | | | |
|-------------|-------------------------|-------------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| EU27 | 57 TUs in 27 MSs | 45 TUs in 23 MSs | 41 TUs in 20 MSs | 39 TUs in 18 MSs | 52 TUs in 26 MSs | 45 TUs in 21 MSs | 45 TUs in 21 MSs |
| AT | GBH | | | | | | |
| | GPA | | | | | | |
| BE | ACLVB-CGSLB | | | | | | |
| | ACV-CSC BIE | | | | | | |
| | ABVV-FGTB ACCG | | | | | | |
| BG | BFTOFWPI | | | | | | |
| | FLI Podkrepa | | | | | | |
| CY | Oikodomoi-PEO | | | | | | |
| | Sebettyk-PEO | | | | | | |
| | OOIM-SEK | | | | | | |
| | OBIEK-SEK | | | | | | |
| CZ | OS DLV | | | | | | |
| DE | IG Metall | | | | | | |

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | |
|----|------------------------|------|------|------|------|------|------|
| DK | CO-industri | | | | | | |
| | 3F | | | | | | |
| EE | EMTAÜ | | | | | | |
| EL | O.O.S.E.E. | | | | | | |
| ES | UGT-FICA | | | | | | |
| | CCOO del Hábitat | | | | | | |
| | ELA | | | | | | |
| FI | Teollisuusliitto | | | | | | |
| | Pro | | | | | | |
| FR | FNCB-CFDT | | | | | | |
| | FG-FO | | | | | | |
| | FNSCBA-CGT | | | | | | |
| | BA-TI-MAT CFTC | | | | | | |
| | Fibopa CFE-CGC | | | | | | |
| HR | SSSH | | | | | | |
| | HRSINDSUM | | | | | | |
| HU | ÉFÉDOSZSZ | | | | | | |
| IE | SIPTU | | | | | | |
| IT | Fillea-CGIL | | | | | | |
| | Filca-CISL | | | | | | |
| | Feneal-UIL | | | | | | |
| LT | LBMA DPS | | | | | | |
| | LMPF | | | | | | |
| LU | OGB-L | | | | | | |
| | LCGB-Indusid | | | | | | |
| LV | LMNA | | | | | | |
| MT | GWU | | | | | | |
| NL | CNV Vakmensen | | | | | | |
| | FNV | | | | | | |
| PL | SBiPD NSZZ Solidarnosc | | | | | | |
| | ZZ Budowlani | | | | | | |
| PT | Setaccop | | | | | | |
| | Fevicom | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |

| | | | | | | | |
|----|----------------------|--|--|--|--|--|--|
| RO | FSLIL | | | | | | |
| | Sindicat MEX Suceava | | | | | | |
| SE | GS | | | | | | |
| | Unionen | | | | | | |
| | Ledarna | | | | | | |
| | SI | | | | | | |
| SI | SLGS (Sinles) | | | | | | |
| | Independence KNSS | | | | | | |
| | Sinles Podgorje | | | | | | |
| | Alternativa Podgorje | | | | | | |
| SK | OZ DLV | | | | | | |

Notes: Green shading denotes a positive response. MS, Member State; n.d., no data; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

The highest coverage was noted in the home furniture subsector, where 91% of all trade unions from 26 Member States were active. Only in Latvia were workers within this NACE code not organised. The least represented furniture subsector was production of mattresses (NACE 31.03). Workers in this subsector have no representation in nine countries (Bulgaria, Czechia, Estonia, Greece, Hungary, Latvia, Lithuania, Malta and Slovakia). Detailed data on the width of the membership domains of the sectoral trade unions were presented in Table 19.

Blue-collar workers are the best-covered occupational group of all four (see Table 17), with 89% of all trade unions in all Member States organising workers of this type. On the other hand, only four trade unions in four countries represent self-employed people (in Croatia, Estonia, Spain and Sweden) (Table 20). Looking at the coverage of companies of different size groups, 19 trade unions from 13 countries did not have full coverage (no data for Luxembourg). In Bulgaria, Hungary, Latvia, Lithuania, Malta, Poland, Romania and Slovakia, companies employing 1–9 workers have no representation in the sector. What is more, in Bulgaria only blue-collar workers from companies employing more than nine people are unionised. In Hungary, trade unions represent only white- and blue-collar workers from companies with 10–49 and 50–249 employees, while in Slovakia only white- and blue-collar workers are represented and only in enterprises employing at least 50 people. There are only two trade unions that represent employees from all company size groups and all occupations, including self-employed people and management staff: EMTAÜ in Estonia and UGT-FICA in Spain.

Table 20: Trade union coverage by workforce categories and company size groups

| MS | Trade union | Parts of the sector organised | | | | | | | | Size of the TU in the sector: 1 = largest, 2 = second largest, etc. |
|-------------|-------------------------|-------------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|--|
| | | Types of workers | | | | Company size group | | | | |
| | | Self-employed | Blue collar | White collar | Management staff | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees | |
| EU27 | 57 TUs in 27 MSs | 4 TUs in 4 MSs | 51 TUs in 27 MSs | 47 TUs in 23 MSs | 35 TUs in 16 MSs | 38 TUs in 18 MSs | 45 TUs in 22 MSs | 46 TUs in 24 MSs | 43 TUs in 21 MSs | |
| AT | GBH | | | | | | | | | 1 |
| | GPA | | | | | | | | | 2 |
| BE | ACLVB-CGSLB | | | | | | | | | 3 |
| | ACV-CSC BIE | | | | | | | | | 1 |
| | ABVV-FGTB ACCG | | | | | | | | | 2 |
| BG | BFTOFWPI | | | | | | | | | 1 |
| | FLI Podkrepa | | | | | | | | | 2 |
| CY | Oikodomoi-PEO | | | | | | | | | 1 |
| | Sebettyk-PEO | | | | | | | | | n.d. |
| | OOIM-SEK | | | | | | | | | 2 |
| | OBIEK-SEK | | | | | | | | | n.d. |
| CZ | OS DLV | | | | | | | | | 1 |
| DE | IG Metall | | | | | | | | | 1 |
| DK | CO-industri | | | | | | | | | 1 |
| | 3F | | | | | | | | | 2 |
| EE | EMTAÜ | | | | | | | | | 1 |
| EL | O.O.S.E.E. | | | | | | | | | 1 |
| ES | UGT-FICA | | | | | | | | | 2 |
| | CCOO del Hábitat | | | | | | | | | 1 |

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | | | | |
|----|------------------------|--|--|--|------|------|------|------|--|-----------------|
| | ELA | | | | | | | | | 3 ³⁶ |
| FI | Teollisuusliitto | | | | | | | | | 1 |
| | Pro | | | | | | | | | 2 |
| FR | FNCB-CFDT | | | | | | | | | 1 |
| | FG-FO | | | | | | | | | 3 |
| | FNSCBA-CGT | | | | | | | | | 2 |
| | BA-TI-MAT CFTC | | | | | | | | | 4 |
| | Fibopa CFE-CGC | | | | | | | | | 5 |
| HR | SSSH | | | | | | | | | 1 ³⁷ |
| | HRSINDSUM | | | | | | | | | 1 ³⁸ |
| HU | ÉFÉDOSZSZ | | | | | | | | | 1 |
| IE | SIPTU | | | | | | | | | 1 |
| IT | Fillea-CGIL | | | | | | | | | 1 |
| | Filca-CISL | | | | | | | | | 2 |
| | Feneal-UIL | | | | | | | | | 3 |
| LT | LBMA DPS | | | | | | | | | 1 |
| | LMPF | | | | | | | | | 2 |
| LU | OGB-L | | | | n.d. | n.d. | n.d. | n.d. | | 1 |
| | LCGB-Indusid | | | | n.d. | n.d. | n.d. | n.d. | | 2 |
| LV | LMNA | | | | | | | | | 1 |
| MT | GWU | | | | | | | | | 1 |
| NL | CNV Vakmensen | | | | | | | | | 2 |
| | FNV | | | | | | | | | 1 |
| PL | SBiPD NSZZ Solidarnosc | | | | | | | | | 1 |
| | ZZ Budowlani | | | | | | | | | 2 |
| PT | Setaccop | | | | | | | | | 2 |
| | Fevicom | | | | | | | | | 1 |
| RO | FSLIL | | | | | | | | | 1 |
| | Sindicat MEX Suceava | | | | | | | | | _39 |

³⁶ The largest one in the Basque Country.

³⁷ The only one in the private sector.

³⁸ The only one in the public sector.

³⁹ Company-level trade union.

| | | | | | | | | | |
|----|----------------------|--|--|--|--|--|--|---|------|
| SE | GS | | | | | | | | 1 |
| | Unionen | | | | | | | | 2 |
| | Ledarna | | | | | | | | n.d. |
| | SI | | | | | | | | n.d. |
| SI | SLGS (Sinles) | | | | | | | | 1 |
| | Independence KNSS | | | | | | | | 2 |
| | Sinles Podgorje | | | | | | | | 3 |
| | Alternativa Podgorje | | | | | | | | 3 |
| SK | OZ DLV | | | | | | | 1 | |

Notes: Green shading denotes a positive response. MS, Member State; n.d., no data; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 21 contains data on the membership strength of national trade unions covering the entire country. It includes the number of members and information about fluctuations in this number in the last two to three years. Most often, information provided by the national correspondents is incomparable. In some cases, the number of members is an absolute number, and in others it is the number of members covered by a specific trade union as a share of the total national sectoral workforce. What is more, some trade unions aggregate data about membership from various sectors, most often furniture and woodworking. In addition, some numbers are estimated rather than exact.

Table 21: Membership strength of the trade unions covering the entire country

| MS | Trade union | Members (absolute number or % of employees in the sector covered by the trade union) | Exact number | Estimate | Drawn from a regional database | Not disclosed | Membership trend |
|----|----------------|--|--------------|----------|--------------------------------|---------------|------------------|
| AT | GBH | Approximately 60% | | X | | | Stable |
| | GPA | Approximately 30% | | X | | | Stable |
| BE | ACLVB-CGSLB | 831 ⁴⁰ | X | | | | n.d. |
| | ACV-CSC BIE | n.d. | | | | | n.d. |
| | ABVV-FGTB ACCG | 5,665 ⁴¹ | X | | | | n.d. |
| CY | Oikodomoi-PEO | 60 | | X | | | Decreasing |

⁴⁰ Combined with woodworking.

⁴¹ Combined with woodworking.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | |
|-----------|------------------|----------------------|---|---|--|---|------------|
| | Sebettyk-PEO | 19 | X | | | | Stable |
| | OOIM-SEK | 57 | | X | | | Decreasing |
| | OBIEK-SEK | 14 | X | | | | Stable |
| CZ | OS DLV | 605 | X | | | | Decreasing |
| DE | IG Metall | 12,000 | X | | | | Stable |
| DK | CO-industri | 7,650 | | | | | n.d. |
| | 3F | 7,650 ⁴² | | | | | n.d. |
| EE | EMTAÜ | n.d. | | | | | Decreasing |
| EL | O.O.S.E.E. | 1,075 ⁴³ | X | | | | Stable |
| ES | UGT-FICA | n.d. | | | | | Stable |
| | CCOO del Hábitat | 4,137 | X | | | | Increasing |
| FI | Teollisuusliitto | 2,000–4,000 | | X | | | Decreasing |
| | Pro | 600 | | X | | | Decreasing |
| FR | FNCB-CFDT | 913 | X | | | | Decreasing |
| | FG-FO | n.d. | | | | | n.d. |
| | FNSCBA-CGT | 1,850 | X | | | | Stable |
| | BA-TI-MAT CFTC | n.d. | | | | | n.d. |
| | Fibopa CFE-CGC | n.d. | | | | | n.d. |
| HR | SSSH | 400 | | X | | | Decreasing |
| | HRSINDSUM | 20 | | X | | | Decreasing |
| IE | SIPTU | <1,000 ⁴⁴ | | | | X | n.d. |
| IT | Fillea-CGIL | n.d. ⁴⁵ | | | | | Stable |
| | Filca-CISL | n.d. ⁴⁶ | | | | | Stable |
| | Feneal-UIL | n.d. ⁴⁷ | | | | | Stable |
| LT | LBMAJDPS | 1,150 | X | | | | Decreasing |

⁴² CO-industri answered from the perspective of 3F, which can be used as a temporary reference.

⁴³ Combined with woodworking.

⁴⁴ Data not confirmed.

⁴⁵ Fillea-CGIL has 320,578 members in three sectors.

⁴⁶ Filca-CISL has 243,765 members in three sectors.

⁴⁷ Feneal-UIL has 159,200 members in three sectors.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | |
|----|------------------------|---------------------------------------|---|---|--|---|------------|
| LU | OGB-L | n.d. | | | | | Increasing |
| | LCGB-Indusid | n.d. | | | | | Stable |
| LV | LMNA | 120 | X | | | | Stable |
| MT | GWU | 30 (2.5%) | X | | | | Increasing |
| NL | CNV Vakmensen | 2–3% ⁴⁸ | | X | | | Stable |
| | FNV | About 7% | | | | | Decreasing |
| PL | SBiPD NSZZ Solidarnosc | 3,300 | X | | | | Increasing |
| | ZZ Budowlani | Less than half of 2,300 ⁴⁹ | | X | | | Increasing |
| PT | Setaccop | 167 | X | | | | Decreasing |
| | Feviccom | About 1,000 | | | | X | |
| RO | FSLIL | 6,820 | X | | | | Decreasing |
| SE | GS | About 30% | | X | | | Decreasing |
| | Unionen | 1,785 | X | | | | Stable |
| | Ledarna | About 30% | | X | | | Decreasing |
| | SI | 250 | X | | | | n.d. |
| SI | SLGS (Sinles) | 30–40% ⁵⁰ | | X | | | Stable |
| | Independence KNSS | 10–20% | | X | | | Stable |
| SK | OZ DLV | 600–800 | | | | X | n.d. |

Notes: MS, Member State; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Not all national trade unions in the furniture sector cover the entire country. For these trade unions, in Table 22, as for those in Table 21, analogous data are presented. The Spanish trade union ELA is the largest trade union in the Basque Country, while Sindicat MEX Suceava (Romania) is a company-level trade union. ÉFÉDOSZSZ (Hungary) represents workers from several regions. Bulgaria's largest and second largest trade unions (BFTOFWPI and FLI Podkrepa), LMPF (Lithuania) and Sinles Podgorje and Alternativa Podgorje (both Slovenia) also do not cover the entire country, but no detailed information was provided about their specific coverage.

⁴⁸ Together with FNV, the representativeness of workers is between 55% and 70%. CNV Vakmensen covers between one-quarter and one-third of this and FNV between two-thirds and three-quarters.

⁴⁹ Combined with woodworking.

⁵⁰ Combined with woodworking.

Table 22: Membership strength of the trade unions not covering the entire country

| MS | Trade union | Members (absolute number or % of employees in the sector covered by the trade union) | Exact number | Estimate | Drawn from a regional database | Not disclosed | Membership trend |
|----|----------------------|--|--------------|----------|--------------------------------|---------------|------------------|
| BG | FLI Podkrepa | 103 | X | | | | Decreasing |
| | BFTOFWP | 270 | X | | | | Decreasing |
| ES | ELA | n.d. | | | | | Increasing |
| HU | ÉFÉDOSZSZ | 250 | X | | | | Decreasing |
| LT | LMPF | About 1,000 | X | | | | Increasing |
| RO | Sindicat MEX Suceava | 0.16% | | X | | | Decreasing |
| SI | Sinles Podgorje | 100 | X | | | | Stable |
| | Alternativa Podgorje | 100 | X | | | | Stable |

Notes: MS, Member State; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

2.2. Involvement of national trade unions in collective bargaining

This section considers the involvement of 49 national trade unions in single-employer collective bargaining (SEB) or multi-employer collective bargaining (MEB). SEB occurs between trade unions and individual companies while MEB takes place between union federations and employer organisations at sectoral level. The involvement of national trade unions in SEB and MEB is presented in Table 23. This table also shows the proportion of the national sectoral workforce covered by the sectoral collective bargaining in which the trade union has been involved. Of the 57 trade unions, 36 have been involved in MEB, and 28 of these have also been involved in SEB. Forty-one trade unions take part in SEB and 13 of them do not also participate in MEB. In the case of eight trade unions, collective bargaining does not occur at all. Lack of collective bargaining in the furniture sector has been noted in Estonia, Greece, Ireland, Luxembourg and Poland. Analysing the share of the sectoral workforce covered by collective bargaining, the highest proportions are in France (100%) and the Netherlands (about 100%). Other countries with high levels of collective bargaining coverage are Denmark, Slovenia, Spain and Sweden. In most cases, trade unions are recognised as representative in the sector, and this is most often based on mutual recognition.

Table 23: Involvement of trade unions in collective bargaining

| MS | Trade union | MEB | SEB | Proportion of the national sectoral workforce covered by the CB for the sector in which the TU is involved | Is it recognised as a representative TU for the furniture sector? | Type of recognition: LR or MR | Are employee representatives elected in the country? | Proportion of representatives in the TU |
|------|------------------|------------------|------------------|--|---|-------------------------------|--|---|
| EU27 | 57 TUs in 27 MSs | 36 TUs in 15 MSs | 41 TUs in 20 MSs | | 51 TUs in 24 MSs | | 41 TUs in 20 MSs | |
| AT | GBH | | | 65% | Yes | LR, MR | Yes | 33% ⁵¹ |
| | GPA | | | Approximately 35% | Yes | LR, MR | Yes | n.d. ⁵² |
| BE | ACLVB-CGSLB | | | n.d. | Yes | LR, MR | Yes | Minority |
| | ACV-CSC BIE | | | 100% | Yes | LR, MR | Yes | 50% |
| | ABVV-FGTB ACCG | | | n.d. | Yes | LR, MR | Yes | 50% |
| BG | BFTOFWPI | | | About 1% | Yes | LR | No | n.a. |
| | FLI Podkrepa | | | 0% | Yes | LR | No | n.a. |
| CY | Oikodomoi-PEO | | | Approximately 35% | Yes | MR | Yes | n.d. |
| | Sebettyk-PEO | | | Approximately 7% | Yes | MR | Yes | n.d. |
| | OOIM-SEK | | | Approximately 35% | Yes | MR | Yes | 1 for 30 ⁵³ |
| | OBIEK-SEK | | | Approximately 7% | Yes | MR | Yes | 1 for 30 ⁵⁴ |
| CZ | OS DLV | | | Approximately 1,100 employees | No | None | No | n.a. |
| DE | IG Metall | | | About 28% | Yes | MR | Yes | 80% |

⁵¹ Within the GBH, there are approximately 2,500 works council representatives, of which around a third (800–900) belong to the woodworking and furniture sectors.

⁵² As GPA represents 25% of the sectoral workforce, and the organisational density lies at around 35%, it can be assumed that only a few hundred white-collar works council representatives are active in the sector.

⁵³ There is 1 representative for every 30 employees.

⁵⁴ There is 1 representative for every 30 employees.

Representativeness of the European social partner organisations: Furniture sector

| MS | Trade union | MEB | SEB | Proportion of the national sectoral workforce covered by the CB for the sector in which the TU is involved | Is it recognised as a representative TU for the furniture sector? | Type of recognition: LR or MR | Are employee representatives elected in the country? | Proportion of representatives in the TU |
|----|-------------------------|-----|-----|--|---|-------------------------------|--|---|
| DK | CO-industri | | | 80% | Yes | MR | Yes | n.d. |
| | 3F | | | 50% | Yes | MR | Yes | n.d. |
| EE | EMTAÜ | | | 0% | No | None | Yes | 12 ⁵⁵ |
| EL | O.O.S.E.E. | | | 0% | Yes | LR, MR | No ⁵⁶ | n.a. |
| ES | UGT-FICA | | | 70–75% | Yes | LR | Yes | Approximately 40% |
| | CCOO del Hábitat | | | 100% | Yes | LR | Yes | 46% |
| | ELA | | | 15–20% | Yes ⁵⁷ | LR | Yes | n.d. |
| FI | Teollisuusliitto | | | 50–70% | Yes | MR | Yes | n.d. |
| | Pro | | | About 10% | Yes | MR | Yes | n.d. |
| FR | FNCB-CFDT | | | 100% | Yes | LR | Yes | 37.75% |
| | FG-FO | | | 100% | Yes | LR | Yes | 17.3% |
| | FNSCBA-CGT | | | 100% | Yes | LR | Yes | 20.91% |
| | BA-TI-MAT CFTC | | | 100% | Yes | LR | Yes | 9.76% |
| | Fibopa CFE-CGC | | | 100% | Yes | LR | Yes | 6.25% |
| HR | SSSH | | | 40–50% | Yes | LR | Yes | 30% |
| | HRSINDSUM | | | 0% | No | n.a. | No | n.a. |
| HU | ÉFÉDOSZSZ ⁵⁸ | | | About 5% | No | MR | Yes | n.d. |
| IE | SIPTU | | | n.d. | Yes | MR | n.d. | n.d. |
| IT | Fillea-CGIL | | | n.d. | Yes | MR | Yes | n.d. |
| | Filca-CISL | | | n.d. | Yes | MR | Yes | n.d. |
| | Feneal-UIL | | | n.d. | Yes | MR | Yes | n.d. |

⁵⁵ There may be more than one representative per company.

⁵⁶ There are no employee representatives outside of the unions. This is because the only legally recognised employee representatives are the elected union members from the primary unions that participate in the congress of the federation.

⁵⁷ At regional level.

⁵⁸ There is inconsistency in the case of Hungary. ÉFÉDOSZSZ has been recognised as not representative, but mutual recognition was indicated.

Representativeness of the European social partner organisations: Furniture sector

| MS | Trade union | MEB | SEB | Proportion of the national sectoral workforce covered by the CB for the sector in which the TU is involved | Is it recognised as a representative TU for the furniture sector? | Type of recognition: LR or MR | Are employee representatives elected in the country? | Proportion of representatives in the TU |
|----|------------------------|-----|-----|--|---|-------------------------------|--|---|
| LT | LBMAJDPS | | | About 30% | Yes | MR | n.d. ⁵⁹ | n.d. |
| | LMPF | | | About 2.5% | Yes | MR | n.d. | n.d. |
| LU | OGB-L | | | n.d. | Yes | LR | No | n.a. |
| | LCGB-Indusid | | | n.d. | Yes | LR | No | n.a. |
| LV | LMNA | | | 2% | Yes | LR | Yes | n.d. |
| MT | GWU | | | 2.5% | Yes | LR, MR | Yes | 1 company |
| NL | CNV Vakmensen | | | Close to 100% | Yes | LR, MR | Yes | n.d. |
| | FNV | | | Close to 100% | Yes | LR, MR | Yes | n.d. |
| PL | SBiPD NSZZ Solidarnosc | | 60 | 0% | Yes | LR | Yes | n.d. |
| | ZZ Budowlani | | | 0% | Yes | LR | Yes | n.d. |
| PT | Setaccop | | | 54% | Yes | MR | Yes | 0 |
| | Fevicom | | | 46% | Yes | MR | Yes | n.d. |
| RO | FSLIL | | | 10% | Yes | LR | Yes | 45 ⁶¹ |
| | Sindicat MEX Suceava | | | 0.16% | Yes ⁶² | LR | Yes | n.d. |
| SE | GS | | | 90% | Yes | MR | No | n.a. |
| | Unionen | | | 5–10% | Yes | MR | No | n.a. |
| | Ledarna | | | 90% | Yes | MR | No | n.a. |
| | SI | | | n.d. | Yes | MR | No | n.a. |
| SI | SLGS (Sinles) | | | 70% | Yes | LR | Yes | 70% |

⁵⁹ According to the Labour Code, if a trade union operating in a company unites less than one-third of employees, works councils must be established in the enterprises with more than 20 employees.

⁶⁰ In Poland, talks and negotiations for a collective bargaining agreement in IKEA were ongoing in 2023, but these had not resulted in an agreement by August 2023, when this study was finalised.

⁶¹ There are three individual members who are employee representatives for each trade union member – $3 \times 15 = 45$ elected employee representatives.

⁶² It is representative at company level.

| MS | Trade union | MEB | SEB | Proportion of the national sectoral workforce covered by the CB for the sector in which the TU is involved | Is it recognised as a representative TU for the furniture sector? | Type of recognition: LR or MR | Are employee representatives elected in the country? | Proportion of representatives in the TU |
|----|----------------------|-----|-----|--|---|-------------------------------|--|---|
| | Independence KNSS | | | 70% | Yes | LR | Yes | 30% |
| | Sinles Podgorje | | | 2% | No | None | No | n.a. |
| | Alternativa Podgorje | | | 2% | No | None | No | n.a. |
| SK | OZ DLV | | | 10–15% | Yes | LR | Yes | n.d. ⁶³ |

Notes: Purple shading denotes a positive response. CB, collective bargaining; LR, formal/legal requirements; MR, mutual recognition; MS, Member State; n.a., not applicable; n.d., no data; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Almost half of all the trade unions have been involved in bipartite or tripartite social dialogue related to the furniture sector (Table 24). In Austria, Belgium, Denmark, Finland, France, Italy, Latvia, Malta, the Netherlands, Slovakia and Slovenia, all sectoral trade unions take part in social dialogue. Except in Austria, Finland, Malta and Slovenia, trade unions in these countries are also involved in paritarian organisations (no data for Slovakia).

Table 24: Involvement of trade unions in social dialogue

| MS | Trade union | MEB | SEB | Involvement of the TU in bipartite or tripartite SD related to the furniture sector | Involvement of the TU in paritarian organisations | Type of consultation with government |
|------|------------------|------------------|------------------|---|---|--------------------------------------|
| EU27 | 57 TUs in 27 MSs | 36 TUs in 15 MSs | 41 TUs in 20 MSs | 27 TUs in 12 MSs | 20 TUs in 9 MSs | |
| AT | GBH | | | Yes | No | Ad hoc |

⁶³ All belong to the only trade union in the sector.

Representativeness of the European social partner organisations: Furniture sector

| MS | Trade union | MEB | SEB | Involvement of the TU in bipartite or tripartite SD related to the furniture sector | Involvement of the TU in paritarian organisations | Type of consultation with government |
|----|------------------|-----|-----|---|---|--------------------------------------|
| | GPA | | | Yes | No | n.a. |
| BE | ACLVB-CGSLB | | | Yes | Yes | Regular |
| | ACV-CSC BIE | | | Yes | Yes | n.d. |
| | ABVV-FGTB ACCG | | | Yes | Yes | Regular |
| BG | BFTOFWPI | | | No | No | n.a. |
| | FLI Podkrepa | | | No | No | n.a. |
| CY | Oikodomoi-PEO | | | No | Yes | n.a. |
| | Sebettyk-PEO | | | No | No | n.a. |
| | OOIM-SEK | | | No | Yes | Ad hoc |
| | OBIEK-SEK | | | No | No | n.a. |
| CZ | OS DLV | | | No | No | n.a. |
| DE | IG Metall | | | No | No | Ad hoc |
| DK | CO-industri | | | Yes | Yes | Ad hoc |
| | 3F | | | Yes | Yes | Ad hoc |
| EE | EMTAÜ | | | No | No | n.a. |
| EL | O.O.S.E.E. | | | No | No | n.a. |
| ES | UGT-FICA | | | No | No | n.a. |
| | CCOO del Hábitat | | | No | No | n.a. |
| | ELA | | | No | No | n.a. |
| FI | Teollisuusliitto | | | Yes | No | Ad hoc |
| | Pro | | | Yes | No | Ad hoc |
| FR | FNCB-CFDT | | | Yes | Yes | Regular |
| | FG-FO | | | Yes | Yes | n.a. |
| | FNSCBA-CGT | | | Yes | Yes | n.a. |
| | BA-TI-MAT CFTC | | | Yes | Yes | n.a. |
| | Fibopa CFE-CGC | | | Yes | Yes | n.a. |
| HR | SSSH | | | No | No | n.a. |

Representativeness of the European social partner organisations: Furniture sector

| MS | Trade union | MEB | SEB | Involvement of the TU in bipartite or tripartite SD related to the furniture sector | Involvement of the TU in paritarian organisations | Type of consultation with government |
|----|------------------------|-----|-----|---|---|--------------------------------------|
| | HRSINDSUM | | | No | No | n.d. |
| HU | ÉFÉDOSZSZ | | | No | No | n.a. |
| IE | SIPTU | | | No | No | n.a. |
| IT | Fillea-CGIL | | | Yes | Yes | Ad hoc |
| | Filca-CISL | | | Yes | Yes | Ad hoc |
| | Feneal-UIL | | | Yes | Yes | Ad hoc |
| LT | LBMAJDPS | | | No | No | n.a. |
| | LMPF | | | No | No | Ad hoc |
| LU | OGB-L | | | No | No | n.a. |
| | LCGB-Indusid | | | No | No | n.a. |
| LV | LMNA | | | Yes | Yes | Ad hoc |
| MT | GWU | | | Yes | No | n.a. |
| NL | CNV Vakmensen | | | Yes | Yes | Ad hoc |
| | FNV | | | Yes | Yes | Ad hoc |
| PL | SBiPD NSZZ Solidarnosc | | | No | No | Ad hoc |
| | ZZ Budowlani | | | No | No | Ad hoc |
| PT | Setaccop | | | No | No | Ad hoc |
| | Feviccom | | | No | No | n.a. |
| RO | FSLIL | | | Yes | Yes | Ad hoc |
| | Sindicat MEX Suceava | | | No | No | n.a. |
| SE | GS | | | No | Yes | Regular |
| | Unionen | | | No | No | Ad hoc |
| | Ledarna | | | No | n.d. | Yes/n.d. |
| | SI | | | No | Yes | Yes/n.d. |
| SI | SLGS (Sinles) | | | Yes | No | Ad hoc |
| | Independence KNSS | | | Yes | No | Ad hoc |
| | Sinles Podgorje | | | Yes | No | n.a. |

| MS | Trade union | MEB | SEB | Involvement of the TU in bipartite or tripartite SD related to the furniture sector | Involvement of the TU in paritarian organisations | Type of consultation with government |
|----|----------------------|-----|-----|---|---|--------------------------------------|
| | Alternativa Podgorje | | | Yes | No | n.a. |
| SK | OZ DLV | | | Yes | n.d. | Regular |

Notes: Purple shading denotes a positive response. MS, Member State; n.a., not applicable; n.d., no data; SD, social dialogue.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Looking at density of collective bargaining coverage, as shown in Table 25, it can be seen that, in countries where collective bargaining occurs, employees of all subsectors are rather well covered. However, in Czechia, collective bargaining does not cover workers of the kitchen furniture, mattresses and garden furniture subsectors. In Hungary, only NACE 31.09 is covered by collective bargaining.

Table 25: Parts of the sector covered by collective bargaining

| MS | Trade union | Parts of the furniture sector | | | | | |
|------|------------------|-------------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|
| | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| EU27 | 57 TUs in 27 MSs | 41 TUs in 19 MSs | 40 TUs in 18 MSs | 35 TUs in 16 MSs | 41 TUs in 11 MSs | 42 TUs in 18 MSs | 42 TUs in 19 MSs |
| AT | GBH | | | | | | |
| | GPA | | | | | | |
| BE | ACLVB-CGSLB | | | | | | |
| | ACV-CSC BIE | | | | | | |
| | ABVV-FGTB ACCG | | | | | | |
| BG | BFTOFWPI | | | | | | |
| | FLI Podkrepa | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |

| MS | Trade union | Parts of the furniture sector | | | | | |
|----|------------------|-------------------------------|-------------------|------------|----------------|------------------|----------|
| | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| CY | Oikodomoi-PEO | | | | | | |
| | Sebettyk-PEO | | | | | | |
| | OOIM-SEK | | | | | | |
| | OBIEK-SEK | | | | | | |
| CZ | OS DLV | | | | | | |
| DE | IG Metall | | | | | | |
| DK | CO-industri | | | | | | |
| | 3F | | | | | | |
| EE | EMTAÜ | n.a. | n.a. | n.a. | n.a. | n.a. | |
| EL | O.O.S.E.E. | n.a. | n.a. | n.a. | n.a. | n.a. | |
| ES | UGT-FICA | | | | | | |
| | CCOO del Hábitat | | | | | | |
| | ELA | | | | | | |
| FI | Teollisuusliitto | | | | | | |
| | Pro | | | | | | |
| FR | FNCB-CFDT | | | | | | |
| | FG-FO | | | | | | |
| | FNSCBA-CGT | | | | | | |
| | BA-TI-MAT CFTC | | | | | | |
| | Fibopa CFE-CGC | | | | | | |
| HR | SSSH | | | | | | |
| | HRSINDSUM | | | | | | |
| HU | ÉFÉDOSZSZ | | | | | | |
| IE | SIPTU | n.d. | n.d. | n.d. | n.d. | n.d. | |
| IT | Fillea-CGIL | | | | | | |
| | Filca-CISL | | | | | | |
| | Feneal-UIL | | | | | | |

| MS | Trade union | Parts of the furniture sector | | | | | |
|----|------------------------|-------------------------------|-------------------|------------|----------------|------------------|----------|
| | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| LT | LBMAJDPS | | | | | | |
| | LMPF | | | | | | |
| LU | OGB-L | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | LCGB-Indusid | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| LV | LMNA | | | | | | |
| MT | GWU | | | | | | |
| NL | CNV Vakmensen | | | | | | |
| | FNV | | | | | | |
| PL | SBiPD NSZZ Solidarnosc | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | ZZ Budowlani | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| PT | Setaccop | | | | | | |
| | Feviccom | | | | | | |
| RO | FSLIL | | | | | | |
| | Sindicat MEX Suceava | | | | | | |
| SE | GS | | | | | | |
| | Unionen | | | | | | |
| | Ledarna | | | | | | |
| | SI | | | | | | |
| SI | SLGS (Sinles) | | | | | | |
| | Independence KNSS | | | | | | |
| | Sinles Podgorje | | | | | | |
| | Alternativa Podgorje | | | | | | |
| SK | OZ DLV | | | | | | |

Notes: Purple shading denotes a positive response. MS, Member State; n.a., not applicable; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

When comparing Tables 19 and 26, it can be seen that not all workers organised in individual trade unions are simultaneously covered by collective bargaining. This applies to, for example, white-collar workers and management staff organised in GPA (Austria) and ABVV-FGTB ACCG (Belgium). In general, management staff are the least covered occupational group (apart from self-employed people, who usually do not take part in collective bargaining). Workers from companies of different sizes can be compared. For instance, employees from companies employing 10–49 workers organised in Sebettyk-PEO (Cyprus) are not covered by collective bargaining.

Table 26: Collective bargaining coverage by workforce categories and company size groups

| MS | Trade union | Types of workers | | | | Company size group | | | |
|------|------------------|----------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|
| | | Self-employed | Blue collar | White collar | Management staff | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees |
| EU27 | 57 TUs in 27 MSs | 0 TUs in 0 MSs | 44 TUs in 22 MSs | 40 TUs in 19 MSs | 32 TUs in 14 MSs | 35 TUs in 15 MSs | 40 TUs in 18 MSs | 41 TUs in 20 MSs | 41 TUs in 19 MSs |
| AT | GBH | | | | | | | | |
| | GPA | | | | | | | | |
| BE | ACLVB-CGSLB | | | | | | | | |
| | ACV-CSC BIE | | | | | | | | |
| | ABVV-FGTB ACCG | | | | | | | | |
| BG | BFTOFWPI | | | | | | | | |
| | FLI Podkrepa | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| CY | Oikodomoi-PEO | | | | | | | | |
| | Sebettyk-PEO | | | | | | | | |
| | OOIM-SEK | | | | | | | | |
| | OBIEK-SEK | | | | | | | | |
| CZ | OS DLV | | | | | | | | |
| DE | IG Metall | | | | | | | | |
| DK | CO-industri | | | | | | | | |
| | 3F | | | | | | | | |

| MS | Trade union | Types of workers | | | | Company size group | | | |
|----|------------------|------------------|-------------|--------------|------------------|--------------------|-----------------|------------------|----------------|
| | | Self-employed | Blue collar | White collar | Management staff | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees |
| EE | EMTAÜ | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| EL | O.O.S.E.E. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| ES | UGT-FICA | | | | | | | | |
| | CCOO del Hábitat | | | | | | | | |
| | ELA | | | | | | | | |
| FI | Teollisuusliitto | | | | | | | | |
| | Pro | | | | | | | | |
| FR | FNCB-CFDT | | | | | | | | |
| | FG-FO | | | | | | | | |
| | FNSCBA-CGT | | | | | | | | |
| | BA-TI-MAT CFTC | | | | | | | | |
| | Fibopa CFE-CGC | | | | | | | | |
| HR | SSSH | | | | 64 | | | | |
| | HRSINDSUM | | | | 65 | | | | |
| HU | ÉFÉDOSZSZ | | | | | | | | |
| IE | SIPTU | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| IT | Fillea-CGIL | | | | | | | | |
| | Filca-CISL | | | | | | | | |
| | Feneal-UIL | | | | | | | | |
| LT | LBMAJ DPS | | | | | | | | |

⁶⁴ Management staff are not members of the trade union, but collective negotiations and agreements cover their positions, working conditions and salaries. The exception is management staff with management contracts. However, such contracts are not very common in the observed sector.

⁶⁵ Management staff are not members of the trade union, but collective negotiations and agreements cover their positions, working conditions and salaries. The exception is management staff with management contracts. However, such contracts are not very common in the observed sector.

| MS | Trade union | Types of workers | | | | Company size group | | | |
|----|------------------------|------------------|-------------|--------------|------------------|--------------------|-----------------|------------------|----------------|
| | | Self-employed | Blue collar | White collar | Management staff | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees |
| | LMPF | | | | | | | | |
| LU | OGB-L | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | LCGB-Indusid | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| LV | LMNA | | | | | | | | |
| MT | GWU | | | | | | | | |
| NL | CNV Vakmensen | | | | | | | | |
| | FNV | | | | | | | | |
| PL | SBiPD NSZZ Solidarnosc | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | ZZ Budowlani | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| PT | Setaccop | | | | | | | | |
| | Feviccom | | | | | | | | |
| RO | FSLIL | | | | | | | | |
| | Sindicat MEX Suceava | | | | | | | | |
| SE | GS | | | | | | | | |
| | Unionen | | | | | | | | |
| | Ledarna | | | | | | | | |
| | SI | | | | | | | | |
| SI | SLGS (Sinles) | | | | | | | | |
| | Independence KNSS | | | | | | | | |
| | Sinles Podgorje | | | | | | | | |
| | Alternativa Podgorje | | | | | | | | |
| SK | OZ DLV | | | | | | | | |

Notes: Purple shading denotes a positive response. MS, Member State; n.a., not applicable; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

2.3. National employer organisation membership domain and membership strength

The representation of employer organisations in the furniture sector by NACE codes and sectoral employment categories is shown in Tables 27 and 28. NACE 31.03 is not covered by any employer organisation in 2 of the 26 countries included (there are no employer organisations in Luxembourg). The same situation exists in the case of NACE 31.09 (garden furniture). All other NACE codes are covered by at least one employer organisation in the 26 Member States. The most employer organisations (45) have their members in NACE 31.09 (home furniture). Slightly fewer organisations (44) have their members in NACE 31.01 and 31.02.

Table 27: Employer organisations, by type of sector coverage

| | NACE 31.01 | NACE 31.02 | NACE 31.03 | NACE 31.09 (home furniture) | NACE 31.09 (garden furniture) | NACE 31.09 (cabinets) | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees |
|---|------------|------------|------------|--------------------------------|----------------------------------|--------------------------|---------------|-----------------|------------------|----------------|
| Number (%) of employer organisations with NACE code/employment category coverage | 44 (85) | 44 (85) | 37 (71) | 45 (87) | 40 (77) | 40 (77) | 40 (77) | 45 (87) | 46 (88) | 37 (71) |
| Number of Member States with NACE code/employment category coverage by at least one employer organisation | 26 | 26 | 25 | 26 | 25 | 26 | 24 | 26 | 26 | 23 |

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 28: Width of employer organisation coverage

| | Number of NACE codes covered | | | | | | | |
|--------------------------------------|---|-----------|-----------|------------|-------------------|-----------|-------------------|----------|
| | 0 | 1 | 2 | 3 | 4 | 5 | 6 (full coverage) | No data |
| Number (%) of employer organisations | 0 (0) | 6 (12) | 1 (2) | 1 (2) | 2 (4) | 7 (13) | 33 (63) | 2 (4) |
| | Number of employment categories covered | | | | | | | |
| | 0 | 1 | 2 | 3 | 4 (full coverage) | No data | | |
| Number (%) of employer organisations | 0 (0) | 2 (4) | 5 (10) | 12 (23) | 30 (58) | 3 (6) | | |

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

There are 52 sector-related employer organisations in the furniture sector, but the average number of these organisations per country is two. It is interesting that, of the 52 employer organisations active in the furniture sector, as many as 34 (65%) have members in all parts of this sector (Table 29). Seven

employer organisations organise companies in almost all NACE codes in the furniture sector (most often besides manufacture of mattresses). Employer organisations exclusively covering one of the NACE codes are relatively rare (only six organisations, 12%), as are those covering only one employment category (only two organisations, 4%). Two of these organisations exist in Austria, which might indicate a significant degree of fragmentation among employer organisations in this country. Two other such organisations can be found in Spain; however, there are seven employer organisations in this country. Furthermore, 30 employer organisations (58%) organise companies in all four company size groups. These data indicate very wide coverage of employer organisations in the furniture sector.

Table 29: Width of membership domains of sectoral employer organisations

| MS | Employer organisation or business association | Parts of the sector organised | | | | | |
|-------------|--|-------------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| | | Membership domain covered | | | | | |
| | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| EU27 | 52 EOs/BAs in 26 MSs | 44 in 26 MSs | 44 in 26 MSs | 37 in 24 MSs | 45 in 26 MSs | 40 in 24 MSs | 42 in 26 MSs |
| AT | FVHI | | | | | | |
| | BITH | | | | | | |
| | BIMT | | | | | | |
| | FVTI | | | | | | |
| BE | Houtunie Houtbewerkers | | | | | | |
| | Fedustria | | | | | | |
| BG | Branch Chamber of Woodworking and Furniture Industry | | | | | | |
| | National Association of Wood Products Companies | | | | | | |
| CY | Pasyvex | | | | | | |
| CZ | AČN | | | | | | |
| DE | VDM | | | | | | |
| | IBA | | | | | | |
| | Tischler Schreiner Deutschland | | | | | | |
| DK | TMI | | | | | | |
| | DI | | | | | | |
| EE | EMPL | | | | | | |

| MS | Employer organisation or business association | Parts of the sector organised | | | | | |
|-----------|---|-------------------------------|-------------------|------------|----------------|------------------|----------|
| | | Membership domain covered | | | | | |
| | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| | EMTL | | | | | | |
| EL | POVSKX | | | | | | |
| ES | FAMO | | | | | | |
| | UNEmadera | | | | | | |
| | AMBIT⁶⁶ | | | | | | |
| | Fevama | | | | | | |
| | Uniema | | | | | | |
| | Asocama | | | | | | |
| | AMC | | | | | | |
| FI | Metsäteollisuus | | | | | | |
| | PTY | | | | | | |
| FR | l'Ameublement français | | | | | | |
| | UNAMA | | | | | | |
| HR | HUP UDPI | | | | | | |
| | DK | | | | | | |
| HU | Fabunio | | | | | | |
| IE | IWFMN | | | | | | |
| IT | FLA | | | | | | |
| | Unital Confapi | | | | | | |
| | CNA Produzione | | | | | | |
| | Confartigianato Legno e Arredo | | | | | | |
| | Casartigiani | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| | CLAAI | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| LT | LM | | | | | | |
| LU | No employer organisation in the sector | | | | | | |
| LV | LKF | | | | | | |

⁶⁶ Previously called Cenfim.

| MS | Employer organisation or business association | Parts of the sector organised | | | | | |
|----|---|-------------------------------|-------------------|------------|----------------|------------------|----------|
| | | Membership domain covered | | | | | |
| | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| MT | CoC | | | | | | |
| | MEA | | | | | | |
| NL | CBM | | | | | | |
| PL | OIGPM⁶⁷ | | | | | | |
| PT | AIMMP | | | | | | |
| | APIMA | | | | | | |
| RO | APMR | | | | | | |
| SE | TMF | | | | | | |
| SI | ZDS | | | | | | |
| | GZS-ZLPI | | | | | | |
| SK | ZSD SR | | | | | | |

Notes: Green shading denotes a positive response. Organisations with names in bold are business associations. BA, business association; EO, employer organisation; MS, Member State; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

There are four countries where certain NACE codes are not covered by any employer organisations. Companies involved in the manufacture of garden furniture (NACE 31.09) lack representation in Czechia and Malta. Companies operating in manufacture of mattresses (NACE 31.03) lack representation in Greece and Hungary. In 14 countries, all employer organisations have members in all parts of the furniture sector.

In the case of 24 employer organisations, there are initiatives/activities organised by these organisations specifically for the small and medium-sized enterprises (SMEs) and microfirms (Table 30). Tables 31 and 32 present membership structure and strength of employer organisations in the furniture sector. Of the 52 employer organisations, 43 (83%) have direct companies as members, some of which also have regional suborganisations as members (which in turn have companies as members). In some countries (Estonia, Malta), employer organisations have only a few companies as members. In other countries (Belgium, France, Portugal, Romania), these organisations are made up of several hundred companies. In general, the membership of employer organisations has increased or has been stable over the last two to three years. Only in two cases (TMI in Denmark, ZSD SR in Slovakia) has membership decreased.

⁶⁷ OIGPM is an associate member of the UEA.

Table 30: Activities organised by the employer organisations/business associations for the SMEs and microfirms

| Member State | Employer organisation or business association | Activities for SMEs | Examples |
|--------------|--|---------------------|--|
| AT | FVHI | n.d. | |
| | BITH | X | Communal advertising (by several companies together) |
| | BIMT | n.d. | |
| | FVTI | n.d. | |
| BE | Houtunie Houtbewerkers | n.d. | |
| | Fedustria | X | Considering that the majority of furniture companies are SMEs, the activities deployed by Fedustria are mainly focused on those. |
| BG | Branch Chamber of Woodworking and Furniture Industry | X | Before the COVID-19 pandemic, the EO organised training sessions, seminars, work visits abroad, attendance of company representatives at expositions and fairs. During the COVID-19 pandemic, all activities became based online wherever possible. Since the end of restrictions, in-person events have once again been organised. |
| | National Association of Wood Products Companies | n.d. | |
| CY | Pasyvex | X | Several programmes regarding education, competitiveness, productivity, health and safety, etc., and initiatives, such as exhibitions, to promote SMEs' products both in Cyprus and abroad |
| CZ | AČN | X | Supporting their business and promoting manufactured products |
| DE | VDM | X | Workshop on online marketing, foreign fairs or label 'Möbel Made in Germany' |
| | IBA | n.d. | |
| | Tischler Schreiner Deutschland | n.d. | |
| DK | TMI | X | |
| | DI | X | DI has an SME committee |
| EE | EMPL | n.d. | |
| | EMTL | n.d. | |
| EL | POVSKX | X | In many cases, the EO submits requests and proposals to the public authorities. It also organises demonstrations/protests for very serious issues. |

| Member State | Employer organisation or business association | Activities for SMEs | Examples |
|--------------|---|---------------------|---|
| | | | <p>During the pandemic, POVSKX requested compensation for its member companies due to the effects of the pandemic in the industry.</p> <p>On 14 June 2021, POVSKX, together with other SME employer organisations, organised a mobilisation protest and submitted a memorandum to the Ministry of Labour and Social Affairs, with basic demands for the protection of workers' incomes in case of illness or accident, the recognition of some professions as unhealthy, a pension in case of accidents, etc.</p> |
| ES | FAMO | X | Promotion of exports and training |
| | UNEmadera | n.d. | |
| | AMBIT ⁶⁸ | n.d. | |
| | Fevama | X | Training for member companies, especially for SMEs |
| | Uniema | n.d. | |
| | Asocama | n.d. | |
| FI | AMC | X | Training |
| | Metsäteollisuus | n.d. | |
| FR | PTY | n.d. | |
| | l'Ameublement français | X | All types of actions, workshops and webinars to support SMEs' business decisions |
| HR | UNAMA | n.d. | |
| | HUP UDPI | X | Helps SMEs and microfirms in their application for EU funds because very often they do not have sufficient expert knowledge for this activity |
| HU | DK | n.d. | |
| | Fabunio | n.d. | |
| IE | IWFMN | X | Webinars on specialist subjects |
| IT | FLA | X | Advocacy focused on regional, national, EU and global institutions; Italian representative for collective bargaining; training programmes and internal academy; centre of studies for marketing and economic research; support for participation in funded projects |
| | Unital Confapi | n.d. | |
| | CNA Produzione | n.d. | |
| | Confartigianato Legno e Arredo | n.d. | |

⁶⁸ Previously called Cenfim.

| Member State | Employer organisation or business association | Activities for SMEs | Examples |
|--------------|---|---------------------|---|
| | Casartigiani | n.d. | |
| | CLAAI | n.d. | |
| LT | LM | n.d. | |
| LU | No employer organisation in the sector | | |
| LV | LKF | X | |
| MT | CoC | X | Several networking events, support services to microenterprises and SMEs, information and consultation sessions, stakeholder engagement, site visits for knowledge transfer and sharing of best practices |
| | MEA | X | SME Week Conference, held every October; focus groups on different topics; surveys analysed by company size |
| NL | CBM | X | Handling of risk assessment and evaluation; collective purchase of energy, which leads to cheaper energy prices; help with the burden smaller companies face with training new recruits by taking on some of the risk Supporting SMEs to recycle furniture products and to reuse wood waste through Wood Loop, diminishing CO ₂ emissions |
| PL | OIGPM | X | Support in obtaining public funds for the promotion of export activities; export promotion; providing information and knowledge |
| PT | AIMMP | X | International exhibitions |
| | APIMA | X | Attending the Interfurniture international fair, promoting the international activity of SMEs |
| RO | APMR | ⁶⁹ | |
| SE | TMF | n.d. | |
| SI | ZDS | n.d. | |
| | GZS-ZLPI | n.d. | |
| SK | ZSD SR | X | |

Notes: Organisations with names in bold are business associations. EO, employer organisation; n.d., no data; SMEs, small and medium-sized enterprises.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

⁶⁹ APMR reported that it was not necessary to organise activities specifically for SMEs because most of its member companies are SMEs and microfirms, and therefore most of its activities are designed for them by default.

Table 31: Membership structure of employer organisations

| MS | Employer organisation or business association | Membership structure | | | Members (absolute number or % of employees in the sector covered by the trade union) | Member companies (absolute number or % of sectoral companies) | | | | Exact number | Estimated number | Drawn from a regional database | Not disclosed |
|----|--|----------------------|---------------------------|------------|--|---|------------------|-----------------|---------------|--------------|------------------|--------------------------------|---------------|
| | | Direct companies | Regional suborganisations | Subsectors | | 250+ employees | 50–249 employees | 10–49 employees | 1–9 employees | | | | |
| AT | FVHI | X | X | | 50 | n.d. | n.d. | n.d. | n.d. | | X | | |
| | BITH | X | X | | 10,886 ⁷⁰ | 2 | 54 | 643 | 2,842 | | X | | |
| | BIMT | X | X | | n.d. | n.d. | n.d. | n.d. | n.d. | | | | |
| | FVTI | X | X | | Approximately 20 | n.d. | n.d. | n.d. | n.d. | | | | |
| BE | Houtunie Houtbewerkers | X | | | 1,038 ⁷¹ | n.d. | n.d. | n.d. | n.d. | X | | | |
| | Fedustria | X | | | 350 | n.d. | n.d. | n.d. | n.d. | X | | | |
| BG | Branch Chamber of Woodworking and Furniture Industry | X | | | ±200 | n.d. | n.d. | n.d. | n.d. | | X | | |
| | National Association of Wood Products Companies | X | | | 25 | 0 | 0 | 0 | 25 | X | | | |
| CY | Pasyvex | X | | | 36 | 0 | 2 | 23 | 11 | | X | | |
| CZ | AČN | X | | X | 61 | 9 | 26 | 25 | 1 | X | | | |
| DE | VDM | | X | X | Around 1,000 | 69 | 405 | 533 | 0 | | | X | |
| | IBA | X | | | 75 | 31 | 34 | 10 | 0 | X | | | |
| | Tischler Schreiner Deutschland | | X | | n.d. | n.d. | n.d. | n.d. | n.d. | | | | |
| DK | TMI | X | | | 100 | 6 | 26 | 50 | 18 | X | | | |
| | DI | X | | | 150 | 5 | 32 | 59 | 54 | X | | | |
| EE | EMPL | X | | | 4 | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| | EMTL | X | | | 28 | 0 | 8 | 6 | 14 | | X | | |

⁷⁰ This number refers to the woodworking and furniture sectors.

⁷¹ 805 without Houtunie Houtbewerkers personnel.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | | | | | | | |
|----|--|---|---|---|-----------------------------------|----------|------|---------------|-------------------------|------|------|------|------|
| EL | POVSKX | | X | X | Approximately 2,250 ⁷² | | | Few | Almost the total number | | X | | |
| ES | FAMO | X | | | 27 | 8 | 16 | 3 | 0 | X | | | |
| | UNEmadera | | X | X | 23,300 ⁷³ | n.d. | n.d. | n.d. | n.d. | | | X | |
| | AMBIT | X | | | 35 | n.d. | n.d. | n.d. | n.d. | | X | | |
| | Fevama | | | X | n.d. | n.d. | n.d. | n.d. | n.d. | | | X | |
| | Uniema | X | | | 45 | n.d. | n.d. | n.d. | n.d. | | X | | |
| | Asocama | X | | | 12 | 10 | 2 | 0 | 0 | X | | | |
| FI | AMC | X | | | 108 | n.d. | n.d. | n.d. | n.d. | X | | | |
| | Metsäteollisuus | | | X | n.d. | n.d. | n.d. | n.d. | n.d. | | | | |
| FR | PTY | X | | | <100 | n.d. | n.d. | n.d. | n.d. | | X | | |
| | l'Ameublement français | X | | | 380 | 24 | 62 | 156 | 138 | X | | | |
| HR | UNAMA | X | | | 139 | 0 | 0 | n.d. | n.d. | | | | |
| | HUP UDPI | X | X | | 30% | 15% | 10% | 30 | 25% | | X | | |
| HU | DK | X | X | | 70 | 1 | 40 | 20 | 9 | | X | | |
| | Fabunio | X | | | 33 | 2 | 7 | 15 | 9 | X | | | |
| IE | IWFMN | X | | | 73 | 1 | 6 | 55 | 11 | X | | | |
| IT | FLA | X | | | Approximately 2,100 | 46 | 259 | 936 | 780 | | | | |
| | Unital Confapi | | X | | n.d. | n.d. | n.d. | n.d. | n.d. | | | | |
| | CNA Produzione | | X | | n.d. | n.d. | n.d. | n.d. | n.d. | | | | |
| | Confartigianato Legno e Arredo | X | | | n.d. | n.d. | n.d. | n.d. | n.d. | | | | |
| | Casartigiani | X | | | n.d. | n.d. | n.d. | n.d. | n.d. | | | | |
| | CLAAI | X | | | n.d. | n.d. | n.d. | n.d. | n.d. | | | | |
| LT | LM | X | | | 30–40 | Majority | Few | Almost absent | Absent | n.d. | n.d. | n.d. | n.d. |
| LU | No employer organisation in the sector | | | | | | | | | | | | |
| LV | LKF | | | X | 15 (2%) | n.d. | n.d. | n.d. | n.d. | X | | | |
| MT | CoC | X | | | 3 | 0 | 1 | 2 | 0 | X | | | |
| | MEA | X | | | 1 | 0 | 1 | 0 | 0 | X | | | |

⁷² In three sectors. 50% of its total membership is in the furniture sector.

⁷³ It includes woodworking, packaging and furniture companies.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | | | | | | | |
|-----------|--------------|---|---|---|-------------------|------|------------------|------|------|---|---|--|---|
| NL | CBM | X | | | >520 | 1% | 2% | 32% | 65% | | X | | |
| PL | OIGPM | X | | | 163 | 25 | 14 | 69 | 55 | X | | | |
| PT | AIMMP | X | | | Approximately 132 | 1 | 64 ⁷⁴ | | 67 | X | | | |
| | APIMA | X | X | X | 250 | 4 | 32 | 172 | 42 | X | | | |
| RO | APMR | X | | | 216 | 25 | 67 | 73 | 51 | X | | | |
| SE | TMF | X | | | 143 | 1 | 31 | 61 | 50 | X | | | |
| SI | ZDS | X | | | 20% | n.d. | n.d. | n.d. | n.d. | | | | X |
| | GZS-ZLPI | X | | | 70% | n.d. | n.d. | n.d. | n.d. | | | | X |
| SK | ZSD SR | X | | X | 16 | 0 | 2 | 12 | 2 | X | | | |

Notes: Organisations with names in bold are business associations. MS, Member State; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 32: Membership strength of employer organisations

| MS | Employer organisation or business association | Members (absolute number or % of employees in the sector covered by the trade union) | Membership trend | Proportion of the sectoral workforce | Size of the employer organisation/ business association in the sector: 1 = largest, 2 = second largest, 3 = third largest, etc. |
|-----------|--|--|-----------------------------------|--------------------------------------|--|
| AT | FVHI | 50 | Stable | n.d. | 1 |
| | BITH | 10,886 | Increasing | n.d. | n.d. |
| | BIMT | n.d. | Stable | n.d. | 3 or 4 |
| | FVTI | Approximately 20 | Stable | 2% | 4 |
| BE | Houtunie Houtbewerkers | 1,038 | n.d. | n.d. | n.d. |
| | Fedustria | 350 | n.d. | n.d. | n.d. |
| BG | Branch Chamber of Woodworking and Furniture Industry | ±200 | Stable; decreased during COVID-19 | n.d. | 1 |
| | National Association of Wood Products Companies | 25 | Increasing | About 1% | |

⁷⁴ This number refers to companies with between 10 and 249 employees.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | |
|-----------|--------------------------------|---------------------|------------|------------------------|--------------|
| CY | Pasyvex | 36 | Increasing | Approximately 42% | 1 |
| CZ | AČN | 61 | Stable | 30% | 1 |
| DE | VDM | Around 1,000 | Stable | 84% | 1 |
| | IBA | 75 | Increasing | n.d. | n.d. |
| | Tischler Schreiner Deutschland | n.d. | n.d. | n.d. | n.d. |
| DK | TMI | 100 | Decreasing | 50% | 2 |
| | DI | 150 | Stable | >75% | 1 |
| EE | EMPL | 28 | Increasing | Approximately 1,500 | |
| | EMTL | 4 | n.d. | n.d. | |
| EL | POVSKX | Approximately 2,250 | Stable | n.d. | |
| ES | FAMO | 27 | Increasing | n.d. | 1 |
| | UNEmadera | 23,300 | Increasing | 130,000 | 2 |
| | AMBIT | 35 | Increasing | n.d. | |
| | Fevama | n.d. | Stable | n.d. | |
| | Uniema | 45 | Increasing | n.d. | |
| | Asocama | 12 | Stable | n.d. | |
| | AMC | 108 | Increasing | 10–15% | |
| FI | Metsäteollisuus | n.d. | n.d. | n.d. | 1 (probably) |
| | PTY | <100 | n.d. | n.d. | 2 (probably) |
| FR | l'Ameublement français | 380 | Increasing | 65% | 1 |
| | UNAMA | 139 | n.d. | 1.4%/35% ⁷⁵ | |
| HR | HUP UDPI | 30% | Increasing | 30–35% | 1 |
| | DK | 70 | Stable | 40% | |
| HU | Fabunio | 33 | Increasing | 2,457 | 1 |
| IE | IWFMN | 73 | Increasing | 10–12% | 1 |
| IT | FLA | 2,100 | Stable | 25% | 1 |
| | Unital Confapi | n.d. | n.d. | n.d. | |
| | CNA Produzione | n.d. | n.d. | n.d. | |
| | Confartigianato Legno e Arredo | n.d. | n.d. | n.d. | |
| | Casartigiani | n.d. | n.d. | n.d. | n.d. |

⁷⁵ 1.40% of the employees; 35% of the whole workforce (including craftspeople).

Representativeness of the European social partner organisations: Furniture sector

| | | | | | |
|-----------|--|---------|------------|-------------------|------|
| | CLAAI | n.d. | n.d. | n.d. | n.d. |
| LT | LM | 30–40 | Stable | Approximately 30% | 1 |
| LU | No employer organisation in the sector | | | | |
| LV | LKF | 15 (2%) | Stable | 40% | 1 |
| MT | CoC | 3 | Stable | 14.3% | 1 |
| | MEA | 1 | Stable | 9% | 2 |
| NL | CBM | >520 | Increasing | 60% | 1 |
| PL | OIGPM | 163 | Increasing | Approximately 10% | 1 |
| PT | AIMMP | 132 | Increasing | 8.5% | 2 |
| | APIMA | 250 | Increasing | 64% | 1 |
| RO | APMR | 216 | Stable | 43.88% | 1 |
| SE | TMF | 143 | Stable | 85% | 1 |
| SI | ZDS | 20% | Stable | 20% | 2 |
| | GZS-ZLPI | 70% | Increasing | 70% | 1 |
| SK | ZSD SR | 16 | Decreasing | About 5–10% | 1 |

Notes: Organisations with names in bold are business associations. MS, Member State; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

2.4. Involvement of national employer organisations in collective bargaining

In 17 countries, at least one employer organisation is involved in collective bargaining (Table 33). Regarding the number of organisations, 35 of the 52 employer organisations (67%) are involved in collective bargaining. Only four organisations (8%) are involved in SEB, of which three only engage in SEB (Bulgaria, Malta, Slovenia). Almost all organisations engaged in collective bargaining (85%) are involved exclusively in MEB. In nine countries – Croatia, Czechia, Estonia, Greece, Hungary, Ireland, Latvia, Poland and Romania – the employer organisations in the furniture sector are not involved in collective bargaining. Luxembourg has no employer organisation in the sector.

Table 33: Status of national employer organisations

| MS | Employer organisation or business association | Involvement in collective bargaining | | Is the organisation considered representative in the country? | Type of recognition: LR or MR | Involvement of the EO/BA in bipartite or tripartite SD related to the furniture sector | Involvement of the EO/BA in paritarian organisations | Number of employees/staff | Type of consultation with government |
|------|--|--------------------------------------|------------|---|-------------------------------|--|--|---------------------------|--------------------------------------|
| | | MEB | SEB | | | | | | |
| EU27 | 52 EOs/BAs in 26 MSs | 31 in 15 MSs | 4 in 4 MSs | 46 in 24 MSs | | 20 in 13 MSs | 21 in 13 MSs | | |
| AT | FVHI | | | Yes | LR, MR | Yes | No | 15 ⁷⁶ | Ad hoc and regular |
| | BITH | | | Yes | LR, MR | No | No | 5 | Ad hoc |
| | BIMT | | | Yes | LR, MR | No | No | n.d. | n.d. |
| | FVTI | | | Yes | LR, MR | Yes | No | n.d. | Regular |
| BE | Houtunie Houtbewerkers | | | Yes | LR | Yes | Yes | n.d. | Regular |
| | Fedustria | | | Yes | LR, MR | Yes | Yes | 28 | Regular |
| BG | Branch Chamber of Woodworking and Furniture Industry | | | Yes | LR | No | No | 4 | None |
| | National Association of Wood Products Companies | | | Yes | LR | No | No | 0 ⁷⁷ | None |

⁷⁶ Only one is responsible for the furniture sector.

⁷⁷ Members carry out voluntary work.

| MS | Employer organisation or business association | Involvement in collective bargaining | | Is the organisation considered representative in the country? | Type of recognition: LR or MR | Involvement of the EO/BA in bipartite or tripartite SD related to the furniture sector | Involvement of the EO/BA in paritarian organisations | Number of employees/staff | Type of consultation with government |
|----|---|--------------------------------------|-----|---|-------------------------------|--|--|---------------------------|--------------------------------------|
| | | MEB | SEB | | | | | | |
| CY | Pasyvex | | | Yes | MR | No | Yes | 0 ⁷⁸ | Regular |
| CZ | AČN | | | No | None | Yes | Yes | 1 | None |
| DE | VDM | | | Yes | MR | Yes | Yes | 20 | Regular |
| | IBA | | | Yes | LR | No | No | 7 | Ad hoc |
| | Tischler Schreiner Deutschland | | | Yes | MR | No | No | n.d. | n.d. |
| DK | TMI ⁷⁹ | | | Yes | MR | Yes | Yes | 5 | Ad hoc |
| | DI | | | Yes | MR | Yes | Yes | About 900 | Regular |
| EE | EMPL | | | No | None | No | No | 4 | Ad hoc |
| | EMTL | | | No | None | No | No | 1 | None |
| EL | POVSKX | | | Yes | MR | No | No | 0 ⁸⁰ | None |
| ES | FAMO | | | Yes | MR | No | No | n.d. | None |
| | UNEmadera | | | Yes | LR | No | No | n.d. | None |
| | AMBIT | | | n.d. | n.d. | No | No | 20 | None |
| | Fevama | | | Yes | MR | No | No | 8 | None |
| | Uniema | | | No | None | No | No | n.d. | None |
| | Asocama | | | Yes | MR | No | No | n.d. | None |
| | AMC | | | Yes | MR | No | No | 4 | None |
| FI | Metsäteollisuus | | | Yes | MR | Yes | No | About 40 | Ad hoc |
| | PTY | | | Yes | MR | n.d. | No | 2 | None |
| FR | l'Ameublement français | | | Yes | LR, MR | Yes | Yes | 20 | Regular |

⁷⁸ Administration is handled by the officers of the Cyprus Employers and Industrialists Federation (OEB).

⁷⁹ TMI takes part in collective bargaining through DI.

⁸⁰ Voluntary work of members.

Representativeness of the European social partner organisations: Furniture sector

| MS | Employer organisation or business association | Involvement in collective bargaining | | Is the organisation considered representative in the country? | Type of recognition: LR or MR | Involvement of the EO/BA in bipartite or tripartite SD related to the furniture sector | Involvement of the EO/BA in paritarian organisations | Number of employees/staff | Type of consultation with government |
|----|---|--------------------------------------|---------------|---|-------------------------------|--|--|---------------------------|--------------------------------------|
| | | MEB | SEB | | | | | | |
| | UNAMA | | | Yes | n.d. | Yes | Yes | n.d. | n.d. |
| HR | HUP UDPI | | ⁸¹ | Yes | LR | No | No | 4 | Regular |
| | DK | | | Yes | LR | No | No | | None |
| HU | Fabunio | | | Yes | MR | No | No | 3 | Ad hoc |
| IE | IWFMN | | | Yes | n.d. | Yes | Yes | 2 | Ad hoc |
| IT | FLA | | | Yes | MR | Yes | Yes | 40 | Regular |
| | Unital Confapi | | | Yes | MR | Yes | Yes | n.d. | n.d. |
| | CNA Produzione | | | Yes | MR | Yes | Yes | n.d. | n.d. |
| | Confartigianato Legno e Arredo | | | Yes | MR | Yes | Yes | n.d. | n.d. |
| | Casartigiani | | | Yes | MR | Yes | Yes | n.d. | n.d. |
| | CLAAI | | | Yes | MR | Yes | Yes | n.d. | n.d. |
| LT | LM | | | Yes | MR | No | No | 2 | Ad hoc |
| LU | No employer organisation in the sector | | | | | | | | |
| LV | LKF | | | Yes | LR | Yes | Yes | 2 | Ad hoc |
| MT | CoC | | | Yes | LR | No | No | Over 20 | None |
| | MEA | | | Yes | LR | No | No | 5 | Ad hoc |
| NL | CBM | | | Yes | LR, MR | Yes | Yes | | Regular |
| PL | OIGPM | | | Yes | MR | No | No | n.d. | Ad hoc |
| PT | AIMMP | | | Yes | MR | No | Yes | 17 | Ad hoc |
| | APIMA | | | Yes | MR | No | No | 6 | Regular |
| RO | APMR | | | Yes | MR | No | Yes | 11 | Ad hoc |

⁸¹ No SEB because collective bargaining at company level is performed by company trade unions and company management, and negotiations are conducted at company level. The Croatian Employers' Association – Wood and Paper Industry Association supports and advises its members.

| MS | Employer organisation or business association | Involvement in collective bargaining | | Is the organisation considered representative in the country? | Type of recognition: LR or MR | Involvement of the EO/BA in bipartite or tripartite SD related to the furniture sector | Involvement of the EO/BA in paritarian organisations | Number of employees/staff | Type of consultation with government |
|----|---|--------------------------------------|-----|---|-------------------------------|--|--|---------------------------|--------------------------------------|
| | | MEB | SEB | | | | | | |
| SE | TMF | | | Yes | LR | No | Yes | 22 | Regular |
| SI | ZDS | | | Yes | MR | Yes | No | 13 | Ad hoc |
| | GZS-ZLPI | | | Yes | MR | Yes | No | 3 | Ad hoc |
| SK | ZSD SR | | | Yes | LR | Yes | No | 3 | Regular |

Notes: In Croatia, there is no bipartite or tripartite SD related to the furniture sector and no paritarian organisations. There are no paritarian organisations in Malta. Purple shading denotes a positive response. Organisations with names in bold are business associations. BA, business association; EO, employer organisation; LR, formal/legal requirements; MR, mutual recognition; MS, Member State; n.d., no data; SD, social dialogue.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Almost all employer organisations are considered representative of the furniture sector in their countries. The representativeness of social partners is not regulated by Czech law. In Estonia, there are no representativeness criteria. Representativeness is more often based on mutual recognition than on formal/legal requirements. Of the 52 employer organisations, 21 (40%) are involved in some kind of paritarian organisation, such as a sectoral fund, a sectoral vocational training programme or any other kind of activity developed in cooperation with a furniture sector employees' trade union.

Table 34 presents the involvement of employer organisations in collective bargaining, taking into account different parts of the furniture sector and different company size groups. Twenty-one employer organisations (40%) are involved in collective bargaining in all NACE codes in the furniture sector, of which the vast majority (76%) are also engaged in collective bargaining in all company size groups.

Table 34: Involvement of employer organisations in collective bargaining, 2021

| MS | Employer organisation/business association | Company size group | | | | | Parts of the furniture sector | | | | |
|------|--|--------------------|-----------------|------------------|----------------|---------------------------|-------------------------------|------------|----------------|------------------|----------|
| | | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| EU27 | 52 EOs/BAs in 26 MSs | 27 | 29 | 28 | 24 | 27 | 28 | 22 | 31 | 26 | 27 |
| | | in | in | in | in | in | in | in | in | in | in |
| | | 12 MSs | 14 MSs | 15 MSs | 14 MSs | 15 MSs | 16 MSs | 13 MSs | 17 MSs | 14 MSs | 15 MSs |
| AT | FVHI | | | | | | | | | | |
| | BITH | | | | | | | | | | |
| | BIMT | | | | | | | | | | |
| | FVTI | | | | | | | | | | |
| BE | Houtunie Houtbewerkers | | | | | | | | | | |
| | Fedustria | | | | | | | | | | |
| BG | Branch Chamber of Woodworking and Furniture Industry | | | | | | | | | | |
| | National Association of Wood Products Companies | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| CY | Pasyvex | | | | | | | | | | |
| CZ | AČN | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| DE | VDM | | | | | | | | | | |
| | IBA | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | Tischler Schreiner Deutschland | n.d. | n.d. | n.d. | n.d. | | | | | | |
| DK | TMI | | | | | | | | | | |
| | DI | | | | | | | | | | |
| EE | EMPL | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | EMTL | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| EL | POVSKX | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| ES | FAMO | | | | | | | | | | |

| MS | Employer organisation/business association | Company size group | | | | | Parts of the furniture sector | | | | |
|----|--|--------------------|-----------------|------------------|----------------|---------------------------|-------------------------------|------------|----------------|------------------|----------|
| | | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| | | | | | | | | | | | |
| | UNEmadera | n.a. | n.a. | n.a. | | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | AMBIT | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | Fevama | | | | | | | | | | |
| | Uniema | | | | | | | | | | |
| | Asocama | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | AMC | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| FI | Metsäteollisuus | | | | | | | | | | |
| | PTY | | | | | | | | | | |
| FR | l'Ameublement français | | | | | | | | | | |
| | UNAMA ⁸² | | | | | | | | | | |
| HR | HUP UDPI | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | DK | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| HU | Fabunio | | | | | | | | | | |
| IE | IWFMN | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| IT | FLA | | | | | | | | | | |
| | Unital Confapi | | | | | | | | | | |
| | CNA Produzione | | | | | | | | | | |
| | Confartigianato Legno e Arredo | | | | | | | | | | |
| | Casartigiani | | | | | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| | CLAAI | | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| LT | LM | | | | | | | | | | |
| LU | No employer organisation in the sector | | | | | | | | | | |

⁸² L'Ameublement français reports that UNAMA organises only craft activities. UNAMA has many affiliated companies without employees, some with 1–9 employees, very few with 10–49 employees and none with 50 or more employees.

| MS | Employer organisation/business association | Company size group | | | | | Parts of the furniture sector | | | | |
|----|--|--------------------|-----------------|------------------|----------------|---------------------------|-------------------------------|------------|----------------|------------------|----------|
| | | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| LV | LKF | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| MT | CoC | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | MEA | | | | | | | | | | |
| NL | CBM | | | | | | | | | | |
| PL | OIGPM | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| PT | AIMMP | | | | | | | | | | |
| | APIMA | | | | | | | | | | |
| RO | APMR | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| SE | TMF | | | | | | | | | | |
| SI | ZDS | | | | | | | | | | |
| | GZS-ZLPI | | | | | | | | | | |
| SK | ZSD SR | | | | | | | | | | |

Notes: Blue and purple shading denote a positive response. Organisations with names in bold are business associations. BA, business association; EO, employer organisation; MS, Member State; n.a., not applicable; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

2.5. National collective bargaining and social dialogue

This section summarises information about the involvement of national trade unions and employer organisations in collective bargaining. Almost half of the trade unions are involved in both SEB and MEB. Some 14% of all trade unions and 74% of all employer organisations take part in MEB only (Table 35). Analysing the situation by country, both SEB and MEB occur in half of the Member States (Table 36). Table 37 presents aggregated data on the density of collective bargaining in individual Member States. More details about the most important sectoral collective bargaining agreements can be found in the overview of the collective bargaining landscape in Annex 3.

Table 35: Collective bargaining in the furniture sector

| Type of collective bargaining | Number of trade unions | Number of employer organisations |
|-------------------------------|------------------------|----------------------------------|
| No collective bargaining | 8 (14%) | 6 (15%) |
| Only SEB | 13 (23%) | 3 (8%) |
| Only MEB | 8 (14%) | 29 (74%) |
| SEB and MEB | 28 (49%) | 2 (5%) ⁸³ |

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 36: Type of collective bargaining, by country

| Type of collective bargaining | Countries |
|-------------------------------|--|
| Only MEB | AT, FI |
| SEB and MEB | BE, CY, DE, DK, ES, FR, HU, ⁸⁴ IT, LT, NL, PT, SE, SI, SK |
| Only SEB | BG, CZ, HR, LV, MT, RO |
| No collective bargaining | EE, EL, IE, LU, PL ⁸⁵ |

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 37: Coverage of collective bargaining, by country

| Type of collective bargaining | Collective bargaining coverage | | | | | | Information not available |
|-------------------------------|--------------------------------|--------------------------|--------|------------|----------------|--------------------|---------------------------|
| | >94% | 75–94% | 50–74% | 25–49% | 1–24% | 0% | |
| MEB | AT | | FI | | | | |
| SEB and MEB | BE, FR, IT, PT | DK, ⁸⁶ ES, SE | NL, SI | CY, DE, LT | HU, SK | | |
| SEB | | RO | | | BG, HR, LV, MT | | CZ |
| No collective bargaining | | | | | | EE, EL, IE, LU, PL | |

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

2.6. Participation in sectoral policies and national sectoral social dialogue

Table 38 provides information on whether employers and trade unions are consulted on sector-related matters by the government. It shows that in 17 countries at least one trade union in the furniture sector was consulted. In Croatia, Hungary, Ireland and Malta, there is no involvement of trade unions in

⁸³ The number includes business association TMI (Denmark), which takes part in collective bargaining through DI.

⁸⁴ In Hungary, MEB is not very widespread; both the trade union side and the employer organisation side consider this type of agreement weak, although it is valid on paper.

⁸⁵ In Poland, talks and negotiations for a collective bargaining agreement in IKEA were ongoing in 2023, but these had not resulted in an agreement by August 2023, when this study was finalised.

⁸⁶ In Denmark, collective bargaining coverage refers to both furniture and woodworking production.

relevant policymaking. In 20 countries (not Bulgaria, Czechia, Estonia, France, Greece, Luxembourg or Spain), at least one employer organisation was consulted by the government. In Luxembourg, there are no employer organisations to consult. In France, there is no information on employer organisation consultation.

Table 38: Consultation of employer organisations and trade unions, by country, 2021

| | Trade unions consulted | No trade unions consulted |
|---|--|---|
| Employer organisations/business associations consulted | AT, BE, CY, DE, DK, FI, IT, LT, LV, NL, PL, PT, RO, SE, SI, SK 16 Member States | HR, HU, IE, MT 4 Member States |
| No employer organisations/business associations consulted | FR ⁸⁷ 1 Member State | BG, CZ, EE, EL, ES, LU ⁸⁸ 6 Member States |

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 39 presents tripartite and/or bipartite permanent social dialogue bodies dealing with sector-related issues. Such trade union and employer organisation bodies exist in 14 Member States. Only in three countries (Germany, the Netherlands and Slovakia) are these social dialogue bodies tripartite. In Ireland, there is no information on such a body. The main areas of activity are occupational safety, vocational training and employment. In the vast majority of cases, these bodies were established on the basis of agreement, not legislation.

Table 39: Tripartite and bipartite social dialogue bodies dealing with sector-related issues or involving sector-related social partners, 2021

| Member State | Social dialogue permanent body | Bipartite/tripartite | Domain of activity | Origin: agreement/statutory | Participating trade unions | Participating employer organisations |
|--------------|--------------------------------|----------------------|--------------------|-----------------------------|--|---|
| AT | | | | | | |
| BE | JC126 | Bipartite | Joint committee | Statutory | ACV-CSC BIE, ACCG, BBTK-SETCa, ACLVB-CGSLB | Houtunie Houtbewerkers, Fedustria |
| BG | | | | | | |
| CY | | | | | | |
| CZ | | | | | | |

⁸⁷ No data for employer organisations/business associations in France.

⁸⁸ No employer organisations/business associations in Luxembourg.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | |
|-----------|--|------------|--|-----------|--|---|
| DE | Branchendialog Konsumgüterindustrie (Industry dialogue in the consumer goods industries) | Tripartite | Sectoral (economic) issues | Agreement | IG Metall | VDM |
| DK | BFA Industri (trade association of industry) | Bipartite | Working environment council for the entire manufacturing industrial sector (including the committee of the Danish Wood Initiative) | Statutory | CO-industri; Dansk Metal; 3Fi; HK Privat; Dansk EI-Forbund; Fødevareforbundet NNF; Teknisk Landsforbund | DI (Dansk Industri); Grakom; Mediearbejdsgiverne; Dansk Mode og Textil; Lederne |
| EE | | | | | | |
| EL | | | | | | |
| ES | | | | | | |
| FI | Puuteollisuuden työalatoimikunta | Bipartite | Occupational safety | Agreement | Teollisuusliitto, Finnish Electrical Workers Union, Pro, the Finnish Business School Graduates (member of YTN) | Metsäteollisuus |
| FR | Commission paritaire permanente de négociation et d'interprétation de l'Ameublement | Bipartite | Collective bargaining, interpretation of national collective agreements | Agreement | FG-FO, FNCB-CFDT, FNCSBA-CGT, BA-TI-MAT CFTC, Fibopa CFE-CGC | UNAMA, l'Ameublement français |
| | Commission paritaire nationale de l'emploi et de la formation de la fabrication de l'Ameublement | Bipartite | Body for mutual information, study, consultation and deliberation in the field of vocational training and employment | Agreement | FG-FO, FNCB-CFDT, FNCSBA-CGT, BA-TI-MAT CFTC, Fibopa CFE-CGC | UNAMA, l'Ameublement français |
| | Observatoire prospectif des métiers et des qualifications de l'ameublement (fabrication) | Bipartite | Employment and qualification observatory | Agreement | FG-FO, FNCB-CFDT, FNCSBA-CGT, BA-TI-MAT CFTC, Fibopa CFE-CGC | UNAMA, l'Ameublement français |
| HR | | | | | | |

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | |
|-----------|--|------------|--|-----------|--|---|
| HU | | | | | | |
| IE | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| IT | Comitato Paritetico Nazionale Legno e Arredamento | Bipartite | General situation of the sector, the labour market, safety and labour costs | Agreement | Feneal-UIL, Filca-CISL, Fillea-CGIL | FLA |
| | Comitato paritetico nazionale | Bipartite | General situation of the sector, the labour market, safety, apprenticeships and equal opportunities | Agreement | Feneal-UIL, Filca-CISL, Fillea-CGIL | Unital Confapi |
| | Osservatorio per i settori Legno, Arredamento, Mobili, Escavazione e Lavorazione dei materiali Lapidei | Bipartite | General situation of the sector, the labour market, safety, apprenticeships and equal opportunities | Agreement | Feneal-UIL, Filca-CISL, Fillea-CGIL | CNA Produzione, Confartigianato Legno e Arredo, Casartigiani, CLAAI |
| LT | | | | | | |
| LU | | | | | | |
| LV | National Tripartite Cooperation Council | Tripartite | Budget and tax policy, labour affairs, social security, vocational education and employment, healthcare, transport and communications, environmental protection, regional development, public security, competitiveness and sustainability | Statutory | Free Trade Union Confederation of Latvia | Latvian Employers' Confederation |
| MT | | | | | | |

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | |
|----|--|------------|---|-----------|--|---|
| NL | Social and Economic Council | Tripartite | Cross-sectoral advisory and research body and forum for policy negotiations | Statutory | CNV Vakmensen, FNV, VCP (Vakcentrale voor Professionals) | VNO-NCW, LTO (Landen Tuinbouworganisatie Nederland) |
| | Stichting van de Arbeid | Bipartite | Cross-sectoral national-level negotiation forum and advisory organisation | Agreement | CNV Vakmensen, FNV, VCP (Vakcentrale voor Professionals) | VNO-NCW, LTO (Landen Tuinbouworganisatie Nederland) |
| PL | | | | | | |
| PT | | | | | | |
| RO | Comitetul Sectorial Silvicultură, Exploatarea și Prelucrarea Lemnului, Industria Mobilei | Bipartite | Forestry, logging and woodworking, furniture | Agreement | FSLIL | APMR, ASFOR |
| SE | | | | | | |
| SI | | | | | | |
| SK | Economic and Social Council | Tripartite | All relevant issues concerning employment, working conditions and wages in the sector | Statutory | OZ DLV through membership of KOZ SR | ZSD SR through membership of RUZ SR |

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

Source: *Network of Eurofound Correspondents' national contributions to this study, 2021*

2.7. Fragmentation and pluralism

This section provides an overview of the reasons for organisational fragmentation and pluralism in the sector. In some Member States, trade unions and employer organisations cover different parts of the sector, making their activities complementary. However, in other Member States, trade unions and employer organisations represent the same type of employees, so there is an overlap in the membership domain.

In the furniture sector, there is an average of 2.1 trade unions per country. The reasons for fragmentation and pluralism of trade unions in the furniture sector are presented in Table 40. In nine countries, only one trade union operates in the sector, so fragmentation does not occur. In countries with more than one trade union in the sector, the main reason for fragmentation given was differences in terms of ideology, even if the membership domain was similar. In the case of six countries, national correspondents indicated more than one reason for fragmentation. In Bulgaria for example, differences in ideology was given as a reason, as were organising different categories of workers and having members in different types of companies.

Table 40: Reasons for fragmentation and pluralism of trade unions in the furniture sector, 2021

| Member State | They organise different categories of workers in the sector | They have members in different parts of the country | They have members in different types of companies | They have members in different parts of the sector/activities | They have similar membership domains but differ in terms of ideology | Other reasons |
|--------------|---|---|---|---|--|---------------|
| AT | | | | | | |
| BE | | | | | | |
| BG | | | | | | |
| CY | | | | | | |
| CZ | Only one trade union in the furniture sector | | | | | |
| DE | Only one trade union in the furniture sector | | | | | |
| DK | | | | | | ⁸⁹ |
| EE | Only one trade union in the furniture sector | | | | | |
| EL | Only one trade union in the furniture sector | | | | | |
| ES | | | | | | |
| FI | | | | | | |
| FR | | | | | | |
| HR | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |

⁸⁹ 3F is a member union of CO-industri. The former negotiates the collective agreement of production workers in woodworking and furniture production. The remaining staff, such as white-collar workers, are covered by other agreements negotiated by CO-industri.

| | | | | | | |
|----|--|--|--|--|--|----|
| HU | Only one trade union in the furniture sector | | | | | |
| IE | Only one trade union in the furniture sector | | | | | 90 |
| IT | | | | | | |
| LT | | | | | | |
| LU | | | | | | |
| LV | Only one trade union in the furniture sector | | | | | |
| MT | Only one trade union in the furniture sector | | | | | |
| NL | | | | | | |
| PL | | | | | | |
| PT | | | | | | |
| RO | | | | | | |
| SE | | | | | | |
| SI | | | | | | |
| SK | Only one trade union in the furniture sector | | | | | |

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

Source: *Network of Eurofound Correspondents' national contributions to this study, 2021*

In the furniture sector, there is an average of 1.9 employer organisations per country. The main reason for this is that the organisations have members in different parts of the sector or in different types of activities. This is the case for six Member States. Slightly less common is fragmentation and pluralism due to employer organisations having members in different types of enterprises (Table 41). Because Greece, Hungary, Ireland, Latvia, Lithuania, the Netherlands, Poland, Romania, Slovakia and Sweden only have one employer organisation each in the furniture sector, there is no pluralism or fragmentation in these countries.

⁹⁰ There appears to be overlap, with both unions covering the same type of workers (blue collar). Connect subsumed the former UCATT (woodworkers) union several years ago.

Table 41: Reasons for fragmentation and pluralism of employer organisations in the furniture sector, 2021

| Member State | The organisations founded for business interests are different from the organisations addressing working conditions matters and collective bargaining | They have members in different types of enterprises/companies | They have members in different parts of the sector/different types of activities | They have similar membership domains but differ in terms of ideology | Other reasons |
|--------------|---|---|--|--|---------------|
| AT | | | | | 91 |
| BE | | | | | |
| BG | | | | | 92 |
| CY | | | | | 93 |
| CZ | | | | | |
| DE | | | | | |
| DK | | | | | 94 |
| EE | | | | | 95 |
| EL | Only one employer organisation in furniture sector | | | | |
| ES | | | | | |
| FI | | | | | |
| FR | | | | | |
| HR | n.d. | n.d. | n.d. | n.d. | n.d. |
| HU | Only one employer organisation in furniture sector | | | | |
| IE | Only one employer organisation in furniture sector | | | | |
| IT | | | | | |
| LT | Only one employer organisation in furniture sector | | | | |
| LU | No employer organisation/business association in the sector | | | | |
| LV | Only one employer organisation in furniture sector | | | | |

⁹¹ FVHI organises and represents large industrial enterprises, while the other employer organisations organise and represent small 'trade/crafts' enterprises in specialised subsectors.

⁹² Bulgarian organisations report organising both the furniture sector and the woodworking sector (see Section 2.8).

⁹³ Different organisations operate as business associations or as employer organisations.

⁹⁴ TMI is the most relevant employer representative in the sector. It is an independent association of DI. DI represents TMI in collective bargaining with trade unions.

⁹⁵ EMPL mostly represents the forestry and woodworking sectors, and is only somewhat related to furniture. EMTL is fully concentrated on the furniture industry.

| | | | | | |
|-----------|---|------|------|------|------|
| MT | n.d. | n.d. | n.d. | n.d. | n.d. |
| NL | Only one employer organisation in furniture sector | | | | |
| PL | Only one employer organisation/business association in furniture sector | | | | |
| PT | | | | | |
| RO | Only one employer organisation in furniture sector | | | | |
| SE | Only one employer organisation in furniture sector | | | | |
| SI | | | | | |
| SK | Only one employer organisation in furniture sector | | | | |

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

Source: *Network of Eurofound Correspondents' national contributions to this study, 2021*

2.8. Multisectoralism

Of the 57 furniture sector trade unions across the 27 Member States, there are 52 (91%) in 26 Member States that also organise the woodworking sector. On the employers' side, there are 52 employer organisations in the furniture sector, in 26 Member States. Forty-one employer organisations (79%) organise both the furniture sector and the woodworking sector, in 23 Member States. This strong multisectoralism of social partners organising both the furniture sector and the woodworking sector is reflected in joint meetings of both ESSDCs since 2016 (see Section 3.9). A detailed description of the extrasectoral membership domains of national organisations can be found in Annex 2.

3. Representativeness of European social partners

In Sections 3.1, 3.4 and 3.5, the membership domain, membership strength and status of the national member organisations affiliated to the European social partner organisations will be presented and analysed for the assessment of their representativeness. At European level, the mandating and decision-making capacities are considered to determine the capacity to negotiate and the ability to commit on behalf of the national membership organisations (Section 3.8). The representativeness of the EFBWW is the focus of Section 3.1, and Sections 3.4 and 3.5 concern the European employer organisations EFIC and the UEA.

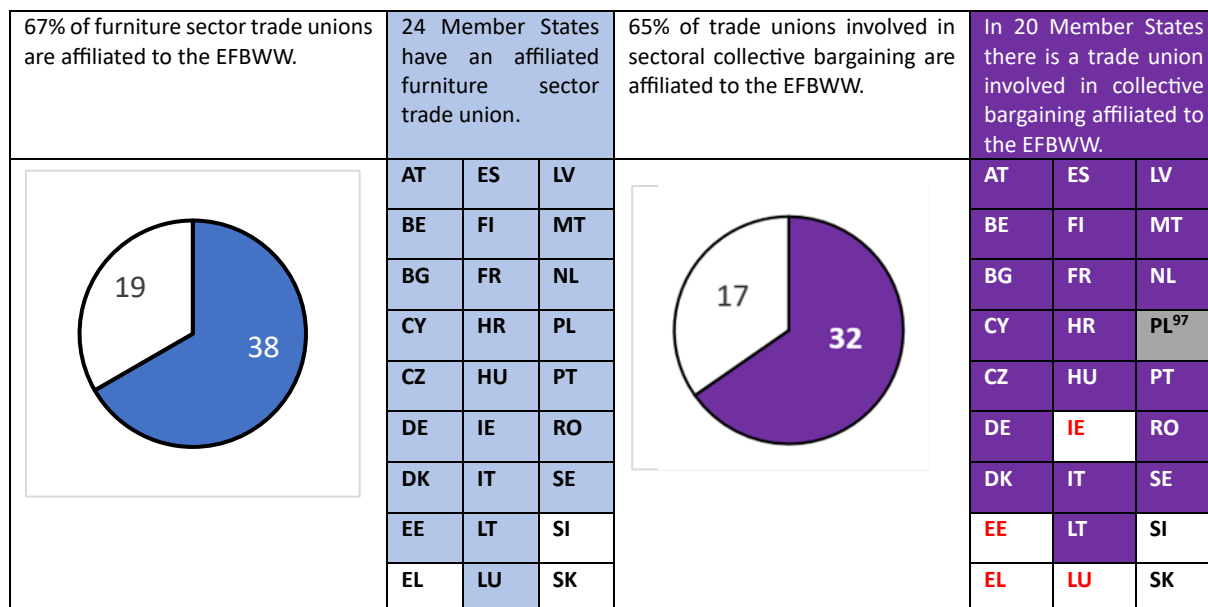
The limits of the representativeness of the European social partner organisations involved in the furniture sector ESSDC are also scrutinised in several ways. This is done by considering the national sectoral organisations not represented on the ESSDC, in Section 3.2 for the trade unions and in Section 3.6 for the national sectoral employer organisations. The other European associations to which sectoral organisations are affiliated are considered in Section 3.3 for the trade unions and in Section 3.7 for the employer organisations. Section 3.8 assesses the effective presence in ESSDC meetings. Finally, an overview of the effective participation of European social partners in the ESSDC is provided in Section 3.9.

3.1. Representativeness of the EFBWW in the furniture sector

The EFBWW is the European workers' industry federation for the building, woodworking and forestry sectors and for allied industries and trades. This federation has 76 affiliated trade unions in 35 countries. The EFBWW is also a member of the European Trade Union Confederation (ETUC).⁹⁶ Of the 57 sectoral trade unions identified in Chapter 2, 38 are affiliated to the EFBWW (67%). In 24 Member States, the EFBWW has an affiliated sectoral trade union. The three Member States with no affiliated sectoral trade union are Greece, Slovakia and Slovenia, as indicated in white on the left of Figure 9. The furniture sector workforce of Slovakia corresponds to 1.5% of the EU27 furniture sector workforce; for Greece this is 1% and for Slovenia 0.6%. The parts of the sector and the types of workers and companies in which the affiliated trade unions have members are indicated in Tables 43 and 44.

⁹⁶ See the EFBWW website.

Figure 9: Scoreboard of the representativeness of the EFBWW in the furniture sector



Notes: Blue shading denotes Member States where there is an affiliate. Purple shading denotes the Member States where there is an affiliate involved in CB. Red font denotes Member States with no furniture sector CB (EE, EL, IE, LU). Poland is marked grey on the right, because no established collective bargaining practice exists, although talks and company-level negotiations in IKEA, the largest Polish furniture company, were ongoing, but had not reached an agreement when this study was finalised in August 2023.

Source: Table 47

In the right-hand panel of Figure 9, in purple, it is indicated that 32 of the 49 trade unions involved in collective bargaining are affiliated to the EFBWW. For 20 of the 22 Member States where there is sectoral collective bargaining, there is an affiliated trade union involved in these collective bargaining negotiations. In Poland, talks about negotiations in the largest Polish furniture company were ongoing, but no agreement had been reached by the time this study was finalised in August 2023. Details about the coverage of their collective bargaining can be found in Tables 47–50. In Slovakia and Slovenia, there are trade unions involved in furniture sector collective bargaining but none of them is affiliated to the EFBWW. In Estonia, Greece, Ireland and Luxembourg, no furniture sector collective bargaining takes place.

In 21 Member States, the trade union with the most members in the sector is affiliated to the EFBWW. For Cyprus, Lithuania and Portugal, it is not the largest trade union that is affiliated but the second largest. There are 13 Member States where trade unions affiliated to the EFBWW cover all types of activities in the furniture sector. Trade unions cover all types of workers in the furniture sector in only two Member States (Estonia and Spain) (Table 42).

⁹⁷ In Poland, talks and negotiations for a collective bargaining agreement in IKEA were ongoing in 2023, but these had not yet resulted in an agreement by August 2023, when this study was finalised.

Table 42: Representativeness of the European trade union organisations in the furniture sector

| | |
|---|---|
| Countries where the largest trade union is affiliated to the EFBWW | AT, BE, BG, CZ, DE, DK, EE, ES, FI, FR, HR (public sector), HU, IE, IT, LU, LV, MT, NL, PL, RO, SE |
| Countries where the second largest trade union is affiliated to the EFBWW | BE, CY, DK, ES, FI, FR, IT, LT, LU, NL, PL, PT, SE |
| Countries where trade unions affiliated to the EFBWW cover all types of activities in the furniture sector (all NACE codes) | AT, BE, DE, DK, ES, FI, FR, IT, NL, PL, PT, RO, SE |
| Countries where the most representative trade union affiliated to the EFBWW covers NACE 31.01 | AT, BE, CZ, DE, DK, ES, FI, FR, IE, IT, LU, LV, MT, NL, PL, RO, SE |
| Countries where the most representative trade union affiliated to the EFBWW covers 31.02 | AT, BE, DE, DK, ES, FI, FR, IE, IT, MT, NL, PL, RO, SE |
| Countries where the most representative trade union affiliated to the EFBWW covers 31.03 | AT, BE, DE, DK, ES, FI, FR, IE, IT, LU, NL, PL, RO, SE |
| Countries where the most representative trade union affiliated to the EFBWW covers 31.09 | AT, BE, BG, ⁹⁸ CZ, ⁹⁹ DE, DK, EE, ¹⁰⁰ ES, FI, FR, HR (public sector), ¹⁰¹ HU, IE, ¹⁰² IT, LU, LV, ¹⁰³ MT, ¹⁰⁴ NL, PL, RO, SE |
| Countries where trade unions affiliated to the EFBWW cover all types of workers in the furniture sector | EE, ES |
| Countries where trade unions representing furniture sector members are not affiliated to the EFBWW | AT, BG, CY, EL, FR, HR, LT, PT, RO, SE, SI, SK |

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Looking at the membership domains of the EFBWW-affiliated trade unions (Table 43), in general we notice a wide range of activities in terms of those covered by NACE codes. The EFBWW has the largest number of trade unions in absolute numbers in the NACE 31.09 subsector of home furniture, with 36 in 22 Member States. The least represented furniture subsectors are NACE 31.02 and NACE 31.03 (29 trade unions each).

⁹⁸ Only home furniture.

⁹⁹ Without garden furniture.

¹⁰⁰ Only home furniture.

¹⁰¹ Only garden furniture in the public sector.

¹⁰² Only home furniture.

¹⁰³ Only garden furniture.

¹⁰⁴ Without garden furniture.

Table 43: Width of membership domains of sectoral trade unions affiliated to the EFBWW

| MS | Trade union | Parts of the sector organised | | | | | |
|-------------|-------------------------|-------------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
| | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| EU27 | 38 TUs in 24 MSs | 33 TUs in 19 MSs | 29 TUs in 16 MSs | 29 TUs in 15 MSs | 36 TUs in 22 MSs | 32 TUs in 18 MSs | 32 TUs in 18 MSs |
| AT | GBH | | | | | | |
| BE | ACLVB-CGSLB | | | | | | |
| | ACV-CSC BIE | | | | | | |
| | ABVV-FGTB ACCG | | | | | | |
| BG | BFTOFWPI | | | | | | |
| CY | OOIM-SEK | | | | | | |
| CZ | OS DLV | | | | | | |
| DE | IG Metall | | | | | | |
| DK | CO-industri | | | | | | |
| | 3F ¹⁰⁵ | | | | | | |
| EE | EMTAÜ | | | | | | |
| ES | UGT-FICA | | | | | | |
| | CCOO del Hábitat | | | | | | |
| | ELA | | | | | | |
| FI | Teollisuusliitto | | | | | | |
| | Pro | | | | | | |
| FR | FNCB-CFDT | | | | | | |
| | FG-FO | | | | | | |
| | FNSCBA-CGT | | | | | | |
| HR | HRSINDSUM | | | | | | |
| HU | ÉFÉDOSZSZ | | | | | | |
| IE | SIPTU | | | | | | |
| IT | Fillea-CGIL | | | | | | |
| | Filca-CISL | | | | | | |

¹⁰⁵ 3F represents CO-industri in the EFBWW.

| | | | | | | | |
|----|------------------------|--|--|--|--|--|--|
| | Feneal-UIL | | | | | | |
| LT | LMPF | | | | | | |
| LU | OGB-L | | | | | | |
| | LCGB-Indusid | | | | | | |
| LV | LMNA | | | | | | |
| MT | GWU | | | | | | |
| NL | CNV Vakmensen | | | | | | |
| | FNV | | | | | | |
| PL | SBiPD NSZZ Solidarnosc | | | | | | |
| | ZZ Budowlani | | | | | | |
| PT | Setaccop | | | | | | |
| RO | FSLIL | | | | | | |
| SE | GS | | | | | | |
| | Unionen | | | | | | |

Notes: Green shading denotes a positive response. MS, Member State; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Membership of the EFBWW is clearly strongest among the trade unions organising blue-collar workers (Table 44). Only three trade unions affiliated to the EFBWW organise self-employed workers in addition to other types of workers. Looking at the coverage of companies of different size groups, 12 trade unions from 11 Member States did not have full coverage (no data for Luxembourg).

Table 44: Workforce categories and company size groups in the trade unions affiliated to the EFBWW

| MS | Trade union | Parts of the sector organised | | | | | | | | Size of the TU in the sector: 1 = largest, 2 = second largest, 3 = third largest, etc. |
|------|--|-------------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|--|
| | | Types of workers | | | | Company size group | | | | |
| | | Self-employed | Blue collar | White collar | Management staff | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees | |
| EU27 | 38 TUs in 24 MSs | 3 TUs in 3 MSs | 36 TUs in 24 MSs | 31 TUs in 20 MSs | 21 TUs in 13 MSs | 27 TUs in 15 MSs | 31 TUs in 19 MSs | 31 TUs in 18 MSs | 28 TUs in 15 MSs | |
| AT | GBH | | | | | | | | | 1 |
| BE | ACLBV-CGSLB | | | | | | | | | 3 |
| | ACV-CSC BIE | | | | | | | | | 1 |
| | ABVV-FGTB ACCG | | | | | | | | | 2 |
| BG | Bulgarian Federation of Trade Union Organisations in Forestry and Wood Processing Industries | | | | | | | | | 1 |
| CY | OOIM-SEK | | | | | | | | | 2 |
| CZ | OS DLV | | | | | | | | | 1 |
| DE | IG Metall | | | | | | | | | 1 |
| DK | CO-industri | | | | | | | | | 1 |
| | 3F | | | | | | | | | 2 |
| EE | EMTAÜ | | | | | | | | | 1 |
| ES | UGT-FICA | | | | | | | | | 2 |
| | CCOO del Hábitat | | | | | | | | | 1 |
| | ELA | | | | | | | | | 3 ¹⁰⁶ |
| FI | Teollisuusliitto | | | | | | | | | 1 |
| | Pro | | | | | | | | | 2 |
| FR | FNCB-CFDT | | | | | | | | | 1 |
| | FG-FO | | | | | | | | | 3 |

¹⁰⁶ The largest one in the Basque Country.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | | | | |
|----|------------------------|--|--|--|--|------|------|------|------|------------------|
| | FNSCBA-CGT | | | | | | | | | 2 |
| HR | HRSINDSUM | | | | | | | | | 1 ¹⁰⁷ |
| HU | ÉFÉDOSZSZ | | | | | | | | | 1 |
| IE | SIPTU | | | | | | | | | 1 |
| IT | Fillea-CGIL | | | | | | | | | 1 |
| | Filca-CISL | | | | | | | | | 2 |
| | Feneal-UIL | | | | | | | | | 3 |
| LT | LMPF | | | | | | | | 2 | |
| LU | OGB-L | | | | | n.d. | n.d. | n.d. | n.d. | 1 |
| | LCGB-Indusid | | | | | n.d. | n.d. | n.d. | n.d. | 2 |
| LV | LMNA | | | | | | | | 1 | |
| MT | GWU | | | | | | | | | 1 |
| NL | CNV Vakmensen | | | | | | | | | 2 |
| | FNV | | | | | | | | | 1 |
| PL | SBiPD NSZZ Solidarnosc | | | | | | | | | 1 |
| | ZZ Budowlani | | | | | | | | | 2 |
| PT | Setaccop | | | | | | | | | 2 |
| RO | FSLIL | | | | | | | | | 1 |
| SE | GS | | | | | | | | | 1 |
| | Unionen | | | | | | | | | 2 |

Notes: Green shading denotes a positive response. MS, Member State; n.d., no data; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

In Table 45, the proportion of the sectoral workforce organised by EFBWW-affiliated trade unions is indicated. For Austria, Finland and Sweden, this is between 50% and 62%. In three other Member States (the Netherlands, Romania and Spain), it is around 10%. For Denmark, France and Germany, it is about 8%. For all other Member States, the proportion of the sectoral workforce covered by the affiliated trade unions is 5% or less. For Luxembourg, Malta, Poland and Spain, an increasing membership is reported, while for 10 Member States there are EFBWW-affiliated trade unions that report a decreasing trend in the numbers of their affiliated furniture workers. This decreasing trend is reported for Croatia, Cyprus, Czechia, Estonia, Finland, France, the Netherlands, Portugal, Romania and Sweden (see Table 45).

¹⁰⁷ The only one in the public sector.

Table 45: Membership strength of the trade unions affiliated to the EFBWW

| MS | Trade union | Estimated proportion of the sectoral workforce organised | Members (absolute number or % of employees in the sector covered by the trade union) | Exact number | Estimate | Drawn from a regional database | Not disclosed | Membership trend |
|----|------------------|--|--|--------------|----------|--------------------------------|---------------|------------------|
| AT | GBH | 60% | Approximately 60% | | X | | | Stable |
| BE | ACLVB-CGSLB | n.d. | 831 ¹⁰⁸ | X | | | | n.d. |
| | ACV-CSC BIE | | n.d. | | | | n.d. | |
| | (ABVV-FGTB) ACCG | | 5,665 ¹⁰⁹ | X | | | n.d. | |
| CY | OOIM-SEK | 5% | 57 | | X | | Decreasing | |
| CZ | OS DLV | 3% | 605 | X | | | Decreasing | |
| DE | IG Metall | 8% | 12,000 | X | | | Stable | |
| DK | CO-industri | 8% | 7,650 | | | | | |
| | 3F | | 7,650 ¹¹⁰ | | | | | |
| EE | EMTAÜ | n.d. | n.d. | | | | | Decreasing |
| ES | UGT-FICA | 10% | n.d. | | | | | Stable |
| | CCOO del Hábitat | | 4,137 | X | | | Increasing | |
| FI | Teollisuusliitto | 50% | 2,000–4,000 | | X | | | Decreasing |
| | Pro | | 600 | | X | | Decreasing | |
| FR | FNCB-CFDT | 8% | 913 | X | | | | Decreasing |
| | FG-FO | | n.d. | | | | n.d. | |
| | FNSCBA-CGT | | 1,850 | X | | | Stable | |
| HR | HRSINDSUM | 0.2% | 20 | | X | | Decreasing | |
| IE | SIPTU | n.d. | <1,000 ¹¹¹ | | | | X | n.d. |
| IT | Fillea-CGIL | n.d. | n.d. ¹¹² | | | | | Stable |
| | Filca-CISL | | n.d. ¹¹³ | | | | Stable | |

¹⁰⁸ Combined with woodworking.

¹⁰⁹ Combined with woodworking.

¹¹⁰ CO-industri has answered from the perspective of 3F, which can be used as a temporary reference.

¹¹¹ Data not confirmed.

¹¹² Fillea-CGIL has 320,578 members in three sectors.

¹¹³ Filca-CISL has 243,765 members in three sectors.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | | |
|----|------------------------|------|--|---|---|--|--|------------|
| | Feneal-UIL | | n.d. ¹¹⁴ | | | | | Stable |
| LU | OGB-L | n.d. | n.d. | | | | | Increasing |
| | LCGB-Indusid | | n.d. | | | | | Stable |
| LV | LMNA | 2% | 120 | X | | | | Stable |
| MT | GWU | 2.5% | 30 (2.5%) | X | | | | Increasing |
| NL | CNV Vakmensen | 10% | 2–3% ¹¹⁵ | | X | | | Stable |
| | FNV | | About 7% | | | | | Decreasing |
| PL | SBiPD NSZZ Solidarnosc | 3% | 3,300 | X | | | | Increasing |
| | ZZ Budowlani | | Less than half of 2,300 ¹¹⁶ | | X | | | Increasing |
| PT | Setaccop | 0.5% | 167 | X | | | | Decreasing |
| RO | FSLIL | 11% | 6,820 | X | | | | Decreasing |
| SE | GS | 62% | About 30% | | X | | | Decreasing |
| | Unionen | | 1,785 | X | | | | Stable |

Notes: MS, Member State; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 46 shows the two largest trade unions in each Member State that are affiliated to the EFBWW.

Table 46: The two largest trade unions in Member States affiliated to the EFBWW

| Member State | Largest trade union in the sector | Second largest trade union in the sector |
|--------------|-----------------------------------|--|
| AT | GBH | - |
| BE | ACV-CSC BIE | ABVV-FGTB ACCG |
| BG | BFTOFWPI | - |
| CY | ¹¹⁷ | OOIM-SEK |
| CZ | OS DLV | - |
| DE | IG Metall | - |
| DK | CO-industri | 3F |

¹¹⁴ Feneal-UIL has 159,200 members in three sectors.

¹¹⁵ Together with FNV, the representativeness of workers is between 55% and 70%. CNV covers between one-quarter and one-third of this and FNV between two-thirds and three-quarters.

¹¹⁶ This number also includes workers in the woodworking sector.

¹¹⁷ Oikodomoi-PEO is the largest trade union with the most members in the furniture sector in Cyprus, but it is not affiliated to the EFBWW.

| | | |
|----|------------------------|--------------------------|
| EE | EMTAÜ | - |
| ES | CCOO del Hábitat | UGT-FICA |
| FI | Teollisuusliitto | Pro |
| FR | FNCB-CFDT | FNSCBA-CGT |
| HR | ¹¹⁸ | HRSINDSUM ¹¹⁹ |
| HU | ÉFÉDOSZSZ | - |
| IE | SIPTU | - |
| IT | Fillea-CGIL | Filca-CISL |
| LT | ¹²⁰ | LMPF |
| LU | OGB-L | LCGB-Indusid |
| LV | LMNA | - |
| MT | GWU | - |
| NL | FNV | CNV Vakmensen |
| PL | SBiPD NSZZ Solidarnosc | ZZ Budowlani |
| PT | ¹²¹ | Setaccop |
| RO | FSLIL | - |
| SE | GS | Unionen |

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Thirty-two trade unions affiliated to the EFBWW are involved in collective bargaining (marked in purple in Table 47). Twenty-four trade unions are involved in MEB, and 19 of them are also involved in SEB. Lack of collective bargaining in the furniture sector is noted in Estonia, Ireland, Luxembourg and Poland. In Ireland, Luxembourg and Poland, there are trade unions that are recognised as representative in the furniture sector. For Estonia, this is not applicable as there are no clear criteria to distinguish representative trade unions from others.

¹¹⁸ The largest trade union in the Croatian furniture sector (SSH) is not affiliated to the EFBWW.

¹¹⁹ HRSINDSUM has only 20 members in the production of garden furniture sector (see Table 43). It is a trade union with most of its members in the woodworking sector, and is affiliated to the EFBWW (only) for those woodworking sector members. The collective bargaining it is involved in together with SSH does however cover most furniture sector activities.

¹²⁰ LBMAJDPS is the largest trade union with the most members in the furniture sector in Lithuania, but it is not affiliated to the EFBWW.

¹²¹ Feviccom is the largest trade union with the most members in the furniture sector in Portugal, but it is not affiliated to the EFBWW.

Table 47: Collective bargaining and representative status of trade unions affiliated to the EFBWW

| MS | Trade union | MEB | SEB | Proportion of the national sectoral workforce covered by CB for the sector in which the TU is involved | Is it recognised as a representative TU for the furniture sector? | Type of recognition: LR or MR | Are employee representatives elected in the country? | Proportion of representatives in the TU |
|------|--|------------------|------------------|--|---|-------------------------------|--|---|
| EU27 | 38 TUs in 24 MSs | 24 TUs in 12 MSs | 27 TUs in 17 MSs | | 34 TUs in 20 MSs | | 29 TUs in 17 MSs | |
| AT | GBH | | | 65% | Yes | LR, MR | Yes | 33% ¹²² |
| BE | ACLVB-CGSLB | | | n.d. | Yes | LR, MR | Yes | Minority |
| | ACV-CSC BIE | | | 100% | Yes | LR, MR | Yes | 50% |
| | ABVV-FGTB ACCG | | | n.d. | Yes | LR, MR | Yes | 50% |
| BG | Bulgarian Federation of Trade Union Organisations in Forestry and Wood Processing Industries | | | About 1% | Yes | LR | No | n.a. |
| CY | OOIM-SEK | | | Approximately 35% | Yes | MR | Yes | 1 for 30 ¹²³ |
| CZ | OS DLV | | | Approximately 1,100 employees | No | None | No | n.a. |
| DE | IG Metall | | | About 28% | Yes | MR | Yes | 80% |
| DK | CO-industri | | | 80% | Yes | MR | Yes | n.d. |
| | 3F | | | 50% | Yes | MR | Yes | n.d. |
| EE | EMTAÜ | | | 0% | n.a. | None | Yes | 12 ¹²⁴ |
| ES | UGT-FICA | | | 70–75% | Yes | LR | Yes | Approximately 40% |
| | CCOO del Hábitat | | | 100% | Yes | LR | Yes | 46% |

¹²² Within the GBH, there are approximately 2,500 works council representatives, of which around a third (800–900) belong to the woodworking and furniture sectors.

¹²³ There is 1 representative for every 30 employees.

¹²⁴ There may be more than one representative per company.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | | |
|----|---------------------------|--|--|---------------|--------------------|--------|------|-------------------|
| | ELA | | | 15–20% | Yes ¹²⁵ | LR | Yes | n.d. |
| FI | Teollisuusliitto | | | 50–70% | Yes | MR | Yes | n.d. |
| | Pro | | | About 10% | Yes | MR | Yes | n.d. |
| FR | FNCB-CFDT | | | 100% | Yes | LR | Yes | 37.75% |
| | FG-FO | | | 100% | Yes | LR | Yes | 17.3% |
| | FNSCBA-CGT | | | 100% | Yes | LR | Yes | 20.91% |
| HR | HRSINDSUM | | | 0% | No | n.a. | No | n.a. |
| HU | ÉFÉDOSZSZ | | | About 5% | Yes | MR | Yes | n.d. |
| IE | SIPTU | | | n.d. | Yes | MR | n.d. | n.d. |
| IT | Fillea-CGIL | | | n.d. | Yes | MR | Yes | n.d. |
| | Filca-CISL | | | n.d. | Yes | MR | Yes | n.d. |
| | Feneal-UIL | | | n.d. | Yes | MR | Yes | n.d. |
| LT | LMPF | | | About 2.5% | Yes | MR | n.d. | n.d. |
| LU | OGB-L | | | n.d. | Yes | LR | No | n.a. |
| | LCGB-Indusid | | | n.d. | Yes | LR | No | n.a. |
| LV | LMNA | | | 2% | Yes | LR | Yes | |
| MT | GWU | | | 2.5% | Yes | LR, MR | Yes | 1 company |
| NL | CNV Vakmensen | | | Close to 100% | Yes | LR, MR | Yes | n.d. |
| | FNV | | | Close to 100% | Yes | LR, MR | Yes | n.d. |
| PL | SBiPD NSZZ Solidarnosc | | | 0% | Yes | LR | Yes | n.d. |
| | ZZ Budowlani | | | 0% | Yes | LR | Yes | n.d. |
| PT | Setaccop | | | 54% | Yes | MR | Yes | 0 |
| RO | FSLIL | | | 10% | Yes | LR | Yes | 45 ¹²⁶ |
| SE | GS | | | 90% | Yes | MR | No | n.a. |
| | Unionen | | | 5–10% | Yes | MR | No | n.a. |

Notes: Purple shading denotes a positive response. CB, collective bargaining; LR, formal/legal requirements; MR, mutual recognition; MS, Member State; n.a., not applicable; n.d., no data; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

¹²⁵ At regional level.

¹²⁶ There are three individual members who are employee representatives for each trade union member: $3 \times 15 = 45$ elected employee representatives.

Exactly half of the trade unions affiliated to the EFBWW are involved in bipartite or tripartite social dialogue related to the furniture sector (see Table 48). In almost all such cases, trade unions are additionally involved in paritarian organisations. Trade unions in Cyprus and Sweden do not participate in bipartite or tripartite social dialogue, but they are involved in paritarian organisations.

Table 48: Involvement in social dialogue, paritarian organisations and government consultations at national level of trade unions affiliated to the EFBWW

| MS | Trade union | MEB | SEB | Involvement of the TU in bipartite or tripartite SD related to the furniture sector | Involvement of the TU in paritarian organisations | Type of consultation with government |
|------|------------------|------------------|------------------|---|---|--------------------------------------|
| EU27 | 38 TUs in 24 MSs | 24 TUs in 12 MSs | 27 TUs in 17 MSs | 19 TUs in 10 MSs | 17 TUs in 9 MSs | |
| AT | GBH | | | Yes | No | Ad hoc |
| BE | ACLVB-CGSLB | | | Yes | Yes | Regular |
| | ACV-CSC BIE | | | Yes | Yes | n.d. |
| | ABVV-FGTB ACCG | | | Yes | Yes | Regular |
| BG | BFTOFWPI | | | No | No | n.a. |
| CY | OOIM-SEK | | | No | Yes | Ad hoc |
| CZ | OS DLV | | | No | No | n.a. |
| DE | IG Metall | | | No | No | Ad hoc |
| DK | CO-industri | | | Yes | Yes | Ad hoc |
| | 3F | | | Yes | Yes | Ad hoc |
| EE | EMTAÜ | | | No | No | n.a. |
| ES | UGT-FICA | | | No | No | n.a. |
| | CCOO del Hábitat | | | No | No | n.a. |
| | ELA | | | No | No | n.a. |
| FI | Teollisuusliitto | | | Yes | No | Ad hoc |
| | Pro | | | Yes | No | Ad hoc |
| FR | FNCB-CFDT | | | Yes | Yes | Regular |
| | FG-FO | | | Yes | Yes | n.a. |
| | FNSCBA-CGT | | | Yes | Yes | n.a. |
| HR | HRSINDSUM | | | No | No | n.d. |

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | |
|----|------------------------|--|--|-----|-----|---------|
| HU | ÉFÉDOSZSZ | | | No | No | n.a. |
| IE | SIPTU | | | No | No | n.a. |
| IT | Fillea-CGIL | | | Yes | Yes | Ad hoc |
| | Filca-CISL | | | Yes | Yes | Ad hoc |
| | Feneal-UIL | | | Yes | Yes | Ad hoc |
| LT | LMPF | | | No | No | Ad hoc |
| LU | OGB-L | | | No | No | n.a. |
| | LCGB-Indusid | | | No | No | n.a. |
| LV | LMNA | | | Yes | Yes | Ad hoc |
| MT | GWU | | | Yes | No | n.a. |
| NL | CNV Vakmensen | | | Yes | Yes | Ad hoc |
| | FNV | | | Yes | Yes | Ad hoc |
| PL | SBiPD NSZZ Solidarnosc | | | No | No | Ad hoc |
| | ZZ Budowlani | | | No | No | Ad hoc |
| PT | Setaccop | | | No | No | Ad hoc |
| RO | FSLIL | | | Yes | Yes | Ad hoc |
| SE | GS | | | No | Yes | Regular |
| | Unionen | | | No | No | Ad hoc |

Notes: Purple shading denotes a positive response. MS, Member State; n.d., no data; SD, social dialogue; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 49 shows that 24 of the 32 trade unions affiliated to the EFBWW and involved in collective bargaining conduct collective bargaining across all NACE codes in the furniture sector. The vast majority (24 of 32) of trade unions are also engaged in collective bargaining in all company size groups. Employees from companies employing 1–9 workers are the least covered in relation to employees from other company size groups (see Table 50).

Table 49: Collective bargaining coverage of trade unions affiliated to the EFBWW– parts of the furniture sector

| MS | Trade union | Parts of the furniture sector | | | | | |
|-------------|--|-------------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| EU27 | 38 TUs in 24 MSs | 29 TUs in 17 MSs | 27 TUs in 15 MSs | 24 TUs in 12 MSs | 31 TUs in 19 MSs | 28 TUs in 16 MSs | 28 TUs in 16 MSs |
| AT | GBH | | | | | | |
| BE | ACLVB-CGSLB | | | | | | |
| | ACV-CSC BIE | | | | | | |
| | ABVV-FGTB ACCG | | | | | | |
| BG | Bulgarian Federation of Trade Union Organisations in Forestry and Wood Processing Industries | | | | | | |
| CY | OOIM-SEK | | | | | | |
| CZ | OS DLV | | | | | | |
| DE | IG Metall | | | | | | |
| DK | CO-industri | | | | | | |
| | 3F | | | | | | |
| EE | EMTAÜ | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| ES | UGT-FICA | | | | | | |
| | CCOO del Hábitat | | | | | | |
| | ELA | | | | | | |
| FI | Teollisuusliitto | | | | | | |
| | Pro | | | | | | |
| FR | FNCB-CFDT | | | | | | |
| | FG-FO | | | | | | |
| | FNSCBA-CGT | | | | | | |
| HR | HRSINDSUM | | | | | | |
| HU | ÉFÉDOSZSZ | | | | | | |
| IE | SIPTU | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| IT | Fillea-CGIL | | | | | | |

| | | | | | | | |
|----|------------------------|------|------|------|------|------|------|
| | Filca-CISL | | | | | | |
| | Feneal-UIL | | | | | | |
| LT | LMPF | | | | | | |
| LU | OGB-L | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | LCGB-Indusid | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| LV | LMNA | | | | | | |
| MT | GWU | | | | | | |
| NL | CNV Vakmensen | | | | | | |
| | FNV | | | | | | |
| PL | SBiPD NSZZ Solidarnosc | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | ZZ Budowlani | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| PT | Setaccop | | | | | | |
| RO | FSLIL | | | | | | |
| SE | GS | | | | | | |
| | Unionen | | | | | | |

Notes: Purple shading denotes a positive response. MS, Member State; n.a., not applicable; n.d., no data; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 50: Collective bargaining coverage of trade unions affiliated to the EFBWW – workforce categories and company size groups

| MS | Trade union | Types of workers | | | | Company size group | | | |
|------|------------------|----------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|
| | | Self-employed | Blue collar | White collar | Management staff | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees |
| EU27 | 38 TUs in 24 MSs | 0 TUs in 0 MSs | 30 TUs in 20 MSs | 26 TUs in 17 MSs | 17 TUs in 12 MSs | 25 TUs in 13 MSs | 29 TUs in 17 MSs | 28 TUs in 16 MSs | 28 TUs in 16 MSs |
| AT | GBH | | | | | | | | |
| BE | ACLBV-CGSLB | | | | | | | | |
| | ACV-CSC BIE | | | | | | | | |
| | ABVV-FGTB ACCG | | | | | | | | |

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | | | |
|-----------|------------------|------|------|------|----------------|------|------|------|------|
| BG | BFTOFWPI | | | | | | | | |
| CY | OOIM-SEK | | | | | | | | |
| CZ | OS DLV | | | | | | | | |
| DE | IG Metall | | | | | | | | |
| DK | CO-industri | | | | | | | | |
| | 3F | | | | | | | | |
| EE | EMTAÜ | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| ES | UGT-FICA | | | | | | | | |
| | CCOO del Hábitat | | | | | | | | |
| | ELA | | | | | | | | |
| FI | Teollisuusliitto | | | | | | | | |
| | Pro | | | | | | | | |
| FR | FNCB-CFDT | | | | | | | | |
| | FG-FO | | | | | | | | |
| | FNSCBA-CGT | | | | | | | | |
| HR | HRSINDSUM | | | | ¹²⁷ | | | | |
| HU | ÉFÉDOSZSZ | | | | | | | | |
| IE | SIPTU | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| IT | Fillea-CGIL | | | | | | | | |
| | Filca-CISL | | | | | | | | |
| | Feneal-UIL | | | | | | | | |
| LT | LMPF | | | | | | | | |
| LU | OGB-L | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | LCGB-Indusid | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| LV | LMNA | | | | | | | | |
| MT | GWU | | | | | | | | |
| NL | CNV Vakmensen | | | | | | | | |
| | FNV | | | | | | | | |

¹²⁷ Management staff are not members of the trade union, but collective negotiations and agreements cover their positions, working conditions and salaries. The exception is management staff with management contracts. However, such contracts are not very common in the observed sector.

| | | | | | | | | | |
|----|------------------------|------|------|------|------|------|------|------|------|
| PL | SBiPD NSZZ Solidarnosc | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | ZZ Budowlani | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| PT | Setaccop | | | | | | | | |
| RO | FSLIL | | | | | | | | |
| SE | GS | | | | | | | | |
| | Unionen | | | | | | | | |

Notes: Purple shading denotes a positive response. MS, Member State; n.a., not applicable; n.d., no data; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

3.2. Sectoral trade unions not represented in the furniture ESSDC

In 12 Member States, there are trade unions that are not affiliated to the EFBWW. Table 51 gives an overview of these 19 unrepresented organisations. The highest coverage is noted in the home furniture subsector (16 trade unions). The least represented furniture subsector is the production of mattresses (only 10 trade unions). The best-covered occupational group is white-collar workers. Of the 19 trade unions, 16 organise workers in this occupation (Table 52).

Table 51: Width of membership domains of sectoral trade unions not affiliated to the EFBWW

| MS | Trade union | Parts of the sector organised | | | | | |
|------|---------------------------------------|-------------------------------|-------------------|-----------------|------------------|------------------|-----------------|
| | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| EU27 | 19 TUs in 12 MSs | 12 TUs in 9 MSs | 12 TUs in 9 MSs | 10 TUs in 6 MSs | 16 TUs in 11 MSs | 13 TUs in 8 MSs | 13 TUs in 8 MSs |
| AT | GPA | | | | | | |
| BG | Federation of Light Industry Podkrepa | | | | | | |
| CY | Oikodomoi-PEO | | | | | | |
| | Sebettyk-PEO | | | | | | |
| | OBIK-SEK | | | | | | |
| EL | O.O.S.E.E. | | | | | | |
| FR | BA-TI-MAT CFTC | | | | | | |
| | Fibopa CFE-CGC | | | | | | |
| HR | SSSH | | | | | | |
| LT | LBMAJDPS | | | | | | |

| | | | | | | | |
|----|----------------------|------|------|------|------|------|------|
| PT | Fevicom | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| RO | Sindicat MEX Suceava | | | | | | |
| SE | Ledarna | | | | | | |
| | SI | | | | | | |
| SI | SLGS (Sinles) | | | | | | |
| | Independence KNSS | | | | | | |
| | Sinles Podgorje | | | | | | |
| | Alternativa Podgorje | | | | | | |
| SK | OZ DLV | | | | | | |

Notes: Green shading denotes a positive response. MS, Member State; n.d., no data; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 52: Workforce categories and company size groups in the trade unions not affiliated to the EFBWW

| MS | Trade union | Parts of the sector organised | | | | | | | | Size of the TU in the sector: 1 = largest, 2 = second largest, 3 = third largest, etc. |
|------|---------------------------------------|-------------------------------|------------------------|------------------------|-----------------------|-----------------------|-----------------------|------------------------|------------------------|--|
| | | Types of workers | | | | Company size group | | | | |
| | | Self-employed | Blue collar | White collar | Management staff | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees | |
| EU27 | 19 TUs in 12 MSs | 1 TU in 1 MS | 15 TUs in 10 MSs | 16 TUs in 10 MSs | 14 TUs in 7 MSs | 11 TUs in 8 MSs | 14 TUs in 9 MSs | 15 TUs in 12 MSs | 15 TUs in 10 MSs | |
| AT | GPA | | | | | | | | | 2 |
| BG | Federation of Light Industry Podkrepa | | | | | | | | | 2 |
| CY | Oikodomoi-PEO | | | | | | | | | 1 |
| | Sebettyk-PEO | | | | | | | | | n.d. |
| | OBIK-SEK | | | | | | | | | n.d. |
| EL | O.O.S.E.E. | | | | | | | | | 1 |
| FR | BA-TI-MAT CFTC | | | | | | | | | 4 |
| | Fibopa CFE-CGC | | | | | | | | | 5 |

| | | | | | | | | | | |
|----|----------------------|--|--|--|--|--|--|--|--|------------------|
| HR | SSSH | | | | | | | | | 1 ¹²⁸ |
| LT | LBMAJDPS | | | | | | | | | 1 |
| PT | Feviccom | | | | | | | | | 1 |
| RO | Sindicat MEX Suceava | | | | | | | | | 129 |
| SE | Ledarna | | | | | | | | | n.d. |
| | SI | | | | | | | | | n.d. |
| SI | SLGS (Sinles) | | | | | | | | | 1 |
| | Independence KNSS | | | | | | | | | 2 |
| | Sinles Podgorje | | | | | | | | | 3 |
| | Alternativa Podgorje | | | | | | | | | 3 |
| SK | OZ DLV | | | | | | | | | 1 |

Notes: Green shading denotes a positive response. MS, Member State; n.d., no data; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

For seven EU Member States, the largest furniture sector trade union is not represented on the ESSDC. These are SSSH (Croatia), Oikodomoi-PEO (Cyprus), O.O.S.E.E. (Greece), LBMAJDPS (Lithuania), Feviccom (Portugal), OZ DLV (Slovakia) and SLGS (Sinles) (Slovenia). The second largest trade unions not affiliated to the EFBWW are located in Austria, Bulgaria and Slovenia (Table 52).

Table 53 presents the membership strength of the trade unions not affiliated to the EFBWW. For Austria (GPA) and Sweden (Ledarna), this is about 30%. For Independence KNSS from Slovenia, it is about 10–20%. Over the last two to three years, decreasing membership has been reported for Bulgaria, Croatia, Cyprus (Oikodomoi-PEO), Latvia, Romania and Sweden (Ledarna), while the membership for trade unions in other countries has been stable.

¹²⁸ The only one in the private sector.

¹²⁹ Company-level trade union.

Table 53: Membership strength of the trade unions not affiliated to the EFBWW

| MS | Trade union | Members (absolute number or % of employees in the sector covered by the trade union) | Exact number | Estimate | Drawn from a regional database | Not disclosed | Membership trend |
|----|---------------------------------------|--|--------------|----------|--------------------------------|---------------|------------------|
| AT | GPA | Approximately 30% | | X | | | Stable |
| BG | Federation of Light Industry Podkrepa | 103 | X | | | | Decreasing |
| CY | Oikodomoi-PEO | 60 | | X | | | Decreasing |
| | Sebettyk-PEO | 19 | X | | | | Stable |
| | OBIEK-SEK | 14 | X | | | | Stable |
| EL | O.O.S.E.E. | 1,075 ¹³⁰ | X | | | | Stable |
| FR | BA-TI-MAT CFTC | n.d. | | | | | n.d. |
| | Fibopa CFE-CGC | n.d. | | | | | n.d. |
| HR | SSSH | 400 | | X | | | Decreasing |
| LT | LBMAJDPS | 1,150 | X | | | | Decreasing |
| PT | Fevicom | About 1,000 | | | | X | |
| RO | Sindicat MEX Suceava | 0.16% | | X | | | Decreasing |
| SE | Ledarna | About 30% | | X | | | Decreasing |
| | SI | 250 | X | | | | n.d. |
| SI | SLGS (Sinles) | 30–40% ¹³¹ | | X | | | Stable |
| | Independence KNSS | 10–20% | | X | | | Stable |
| | Sinles Podgorje | 100/2% | X | | | | Stable |
| | Alternativa Podgorje | 100/2% | X | | | | Stable |
| SK | OZ DLV | 600–800 | | | | X | n.d. |

Notes: MS, Member State; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

¹³⁰ In the woodworking and furniture sectors.

¹³¹ Also covers woodworking.

Of the 19 unrepresented trade unions, 17 are involved in collective bargaining (marked in purple in Table 54). Twelve trade unions are involved in MEB, and nine of them are also involved in SEB. In the case of two trade unions – in Bulgaria and Greece – collective bargaining does not occur at all. Analysing the share of the sectoral workforce covered by collective bargaining, the highest proportions are obtained in France (100%), Sweden (90%) and Slovenia (70%). In all cases except two, trade unions are recognised as representative in the furniture sector.

Table 54: Status of trade unions not affiliated to the EFBWW

| MS | Trade union | MEB | SEB | Proportion of the national sectoral workforce covered by the CB for the sector in which TU is involved | Is it recognised as a representative TU for the furniture sector? | Type of recognition: LR or MR | Are employee representatives elected in the country? | Proportion of representatives in the TU |
|-------------|---------------------------------------|------------------------|------------------------|--|---|-------------------------------|--|---|
| EU27 | 19 TUs in 12 MSs | 12 TUs in 8 MSs | 14 TUs in 8 MSs | | 17 TUs in 12 MSs | | 12 TUs in 8 MSs | |
| AT | GPA | | | Approximately 35% | Yes | LR, MR | Yes | n.d. ¹³² |
| BG | Federation of Light Industry Podkrepa | | | 0% | Yes | LR | No | - |
| CY | Oikodomoi-PEO | | | Approximately 35% | Yes | MR | Yes | n.d. |
| | Sebettyk-PEO | | | Approximately 7% | Yes | MR | Yes | n.d. |
| | OBIEK-SEK | | | Approximately 7% | Yes | MR | Yes | 1 for 30 ¹³³ |
| EL | O.O.S.E.E. | | | 0% | Yes | LR, MR | No | - |
| FR | BA-TI-MAT CFTC | | | 100% | Yes | LR | Yes | 9.76% |
| | Fibopa CFE-CGC | | | 100% | Yes | LR | Yes | 6.25% |
| HR | SSSH | | | 40–50% | Yes | LR | Yes | 30% |

¹³² As GPA represents 35% of the sectoral workforce, and the organisational density lies at around 30%, it can be assumed that only a few hundred white-collar works council representatives are active in the sector.

¹³³ There is 1 representative for every 30 employees.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | | |
|----|----------------------|--|--|-----------|--------------------|------|---------------------|---------------------|
| LT | LBMA DPS | | | About 30% | Yes | MR | n.d. ¹³⁴ | n.d. |
| PT | Feviccom | | | 46% | Yes | MR | Yes | n.d. |
| RO | Sindicat MEX Suceava | | | 0.16% | Yes ¹³⁵ | LR | Yes | n.d. |
| SE | Ledarna | | | 90% | Yes | MR | No | - |
| | SI | | | n.d. | Yes | MR | No | - |
| SI | SLGS (Sinles) | | | 70% | Yes | LR | Yes | 70% |
| | Independence KNSS | | | 70% | Yes | LR | Yes | 30% |
| | Sinles Podgorje | | | 2% | No | None | No | - |
| | Alternativa Podgorje | | | 2% | No | None | No | - |
| SK | OZ DLV | | | 10–15% | Yes | LR | Yes | n.d. ¹³⁶ |

Notes: Purple shading denotes a positive response. CB, collective bargaining; LR, formal/legal requirements; MR, mutual recognition; MS, Member State; n.d., no data; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Eight of the 19 unrepresented trade unions, in four Member States, are involved in bipartite or tripartite social dialogue related to the furniture sector (Table 55). In France, trade unions are additionally involved in paritarian organisations (no data for Slovakia).

Table 55: Involvement in social dialogue, paritarian organisations and government consultations at national level of trade unions not affiliated to the EFBWW

| MS | Trade union | MEB | SEB | Involvement of the TU in bipartite or tripartite SD related to the furniture | Involvement of the TU in paritarian organisations. | Type of consultation with government |
|------|---------------------------------------|-----------------|-----------------|--|--|--------------------------------------|
| EU27 | 19 TUs in 12 MSs | 12 TUs in 8 MSs | 14 TUs in 8 MSs | 8 TUs in 4 MSs | 4 TUs in 3 MSs | |
| AT | GPA | | | Yes | No | n.a. |
| BG | Federation of Light Industry Podkrepa | | | No | No | n.a. |
| CY | Oikodomoi-PEO | | | No | Yes | n.a. |
| | Sebettyk-PEO | | | No | No | n.a. |

¹³⁴ According to the Labour Code, if a trade union operating in the company unites less than one-third of employees, works councils have to be established in the enterprises with more than 20 employees.

¹³⁵ It is representative at company level.

¹³⁶ All belong to the only trade union in the sector.

| | | | | | | |
|----|----------------------|--|--|-----|------|-----------|
| | OBIEK-SEK | | | No | No | n.a. |
| EL | O.O.S.E.E. | | | No | No | n.a. |
| FR | BA-TI-MAT CFTC | | | Yes | Yes | n.a. |
| | Fibopa CFE-CGC | | | Yes | Yes | n.a. |
| HR | SSSH | | | No | No | n.a. |
| LT | LBMAJDPS | | | No | No | n.a. |
| PT | Feviccom | | | No | No | n.a. |
| RO | Sindicat MEX Suceava | | | No | No | n.a. |
| SE | Ledarna | | | No | n.d. | Yes*/n.d. |
| | SI | | | No | Yes | Yes*/n.d. |
| SI | SLGS (Sinles) | | | Yes | No | Ad hoc |
| | Independence KNSS | | | Yes | No | Ad hoc |
| | Sinles Podgorje | | | Yes | No | n.a. |
| | Alternativa Podgorje | | | Yes | No | n.a. |
| SK | OZ DLV | | | Yes | n.d. | Regular |

Notes: Purple shading denotes a positive response. MS, Member State; n.a., not applicable; n.d., no data; SD, social dialogue; TU, trade union. * Consultation with government takes place but the type of consultation is unknown.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 56 shows that 10 of the 17 unrepresented trade unions involved in collective bargaining are involved in all subsectors. In the case of Oikodomoi-PEO (Cyprus) and Sindicat MEX Suceava (Romania), only NACE 31.09 (mattresses) is not covered by collective bargaining. Taking into account the workforce categories, it is interesting that management staff are the occupational group that is the best covered by collective bargaining (Table 57).

Table 56: Collective bargaining coverage of trade unions not affiliated to the EFBWW – parts of the furniture sector

| MS | Trade union | Parts of the furniture sector | | | | | |
|------|---------------------------------------|-------------------------------|---------------------|--------------------|---------------------|--------------------|--------------------|
| | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| EU27 | 19 TUs in 12 MSs | 12 TUs in 9 MSs | 13 TUs in 10 MSs | 11 TUs in 8 MSs | 15 TUs in 10 MSs | 14 TUs in 9 MSs | 14 TUs in 9 MSs |
| AT | GPA | | | | | | |
| BG | Federation of Light Industry Podkrepa | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| CY | Oikodomoi-PEO | | | | | | |
| | Sebettyk-PEO | | | | | | |
| | OBIEK-SEK | | | | | | |
| EL | O.O.S.E.E. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| FR | BA-TI-MAT CFTC | | | | | | |
| | Fibopa CFE-CGC | | | | | | |
| HR | SSSH | | | | | | |
| LT | LBMA DPS | | | | | | |
| PT | Feviccom | | | | | | |
| RO | Sindicat MEX Suceava | | | | | | |
| SE | Ledarna | | | | | | |
| | SI | | | | | | |
| SI | SLGS (Sinles) | | | | | | |
| | Independence KNSS | | | | | | |
| | Sinles Podgorje | | | | | | |
| | Alternativa Podgorje | | | | | | |
| SK | OZ DLV | | | | | | |

Notes: Purple shading denotes a positive response. MS, Member State; n.a., not applicable; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 57: Collective bargaining coverage of trade unions not affiliated to the EFBWW – workforce categories and company size groups

| MS | Trade union | Types of workers | | | | Company size group | | | |
|------|---------------------------------------|------------------|-----------------|-----------------|------------------|--------------------|-----------------|------------------|-----------------|
| | | Self-employed | Blue collar | White collar | Management staff | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees |
| EU27 | 19 TUs in 12 MSs | 0 TUs | 14 TUs in 8 MSs | 14 TUs in 8 MSs | 15 TUs in 8 MSs | 10 TUs in 7 MSs | 11 TUs in 7 MSs | 13 TUs in 10 MSs | 13 TUs in 8 MSs |
| AT | GPA | | | | | | | | |
| BG | Federation of Light Industry Podkrepa | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| CY | Oikodomoi-PEO | | | | | | | | |
| | Sebettyk-PEO | | | | | | | | |
| | OBIEK-SEK | | | | | | | | |
| EL | O.O.S.E.E. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| FR | BA-TI-MAT CFTC | | | | | | | | |
| | Fibopa CFE-CGC | | | | | | | | |
| HR | SSSH | | | | 137 | | | | |
| LT | LBMA DPS | | | | | | | | |
| PT | Fevicom | | | | | | | | |
| RO | Sindicat MEX Suceava | | | | | | | | |
| SE | Ledarna | | | | | | | | |
| | SI | | | | | | | | |
| SI | SLGS (Sinles) | | | | | | | | |
| | Independence KNSS | | | | | | | | |
| | Sinles Podgorje | | | | | | | | |
| | Alternativa Podgorje | | | | | | | | |
| SK | OZ DLV | | | | | | | | |

Notes: Purple shading denotes a positive response. MS, Member State; n.a., not applicable; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

¹³⁷ Management staff are not members of the trade union, but collective negotiations and agreements cover their positions, working conditions and salaries. The exception is management staff with management contracts. However, such contracts are not very common in the observed sector.

Table 57 also presents the collective bargaining coverage of workers from companies of different sizes. Employees from companies employing 1–9 workers are the least covered in relation to those from other company size groups. In the case of nine unrepresented trade unions, collective bargaining concerns all company size groups.

3.3. Other European associations to which national sectoral trade unions are affiliated

Table 58 provides an overview of the affiliations of national trade unions in the furniture sector. As it shows, around half of the trade unions (27 of the 57) have no affiliations to European organisations other than the EFBWW. There are 10 trade unions affiliated both to the EFBWW and to other European associations. Ten of the sixteen trade unions affiliated to other European associations are involved in the management bodies of these organisations (see Table 58). More details about the affiliation of national sectoral trade unions to other European organisations can be found in Annex 4.

Table 58: Affiliation to the other European associations

| MS | Trade union | Affiliation to the EFBWW | Affiliation to the other European associations | Involvement in the management bodies of the other European associations | Payment of affiliation fees to the other European associations for the workers/members in the furniture sector | Active involvement in furniture sector activities or working groups of the other European associations | Examples |
|------|------------------|--------------------------|--|---|--|--|---|
| EU27 | 57 TUs in 27 MSs | 38 TUs in 24 MSs | 16 TUs in 12 MSs | 10 TUs in 9 MSs | 9 TUs in 6 MSs | 10 TUs in 8 MSs | |
| AT | GBH | | - | No | No | No | |
| | GPA | | IndustriALL, UNI Europa, EFFAT, EPSU, ETF, EFJ | Yes ¹³⁸ | No | Yes | Participates in the UNI Europa policymaking working group |
| BE | ACLVB-CGSLB | | - | No | No | No | |
| | ACV-CSC BIE | | n.d. | n.d. | n.d. | n.d. | |
| | ABVV-FGTB ACCG | | - | No | No | No | |

¹³⁸ In IndustriALL and UNI Europa.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | |
|----|--|--|---|-----|-------------------|-----|---|
| BG | Bulgarian Federation of Trade Union Organisations in Forestry and Wood Processing Industries | | - | No | No | No | |
| | Federation of Light Industry Podkrepa | | IndustriALL | No | n.d. | Yes | Participates in discussions on sector-related social dialogue, the European minimum wage and working conditions |
| CY | Oikodomoi-PEO | | - | No | No | No | |
| | Sebettyk-PEO | | - | No | No | No | |
| | OOIM-SEK | | - | No | No | No | |
| | OBIEK-SEK | | IndustriALL | Yes | Yes | Yes | |
| CZ | OS DLV | | - | No | No | No | |
| DE | IG Metall | | IndustriALL | Yes | No | No | |
| DK | CO-industri | | - | No | No | No | |
| | 3F | | BWI (through CO-industri), IndustriALL, UNI Europa, EFFAT, EPSU, ETF, CEC European Managers | No | No ¹³⁹ | No | |
| EE | EMTAÜ | | - | No | No | No | |
| EL | O.O.S.E.E. | | European part of UITBB | Yes | Yes | Yes | Organisation of the 17th Congress of the International Trade Union of Workers in the Construction, Wood and Building Materials Industries (UITBB) in Athens on 31 January and 1 February 2020 |
| ES | UGT-FICA | | UNI Europa | No | Yes | Yes | In the Furniture and Woodworking Sectoral Committee |
| | CCOO del Hábitat | | UNI Europa, EPSU | Yes | Yes | Yes | European social dialogue and the Furniture and Woodworking Committee, on behalf of UNI Europa |

¹³⁹ Indirectly through CO-industri.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | |
|----|------------------------|--|--|--------------------|-----|--------------------|--|
| | ELA | | IndustriALL | No | Yes | n.d. | |
| FI | Teollisuusliitto | | IndustriALL, UNI Europa, EFFAT | Yes ¹⁴⁰ | Yes | Yes ¹⁴¹ | |
| | Pro | | - | No | No | No | |
| FR | FNCB-CFDT | | - | No | No | No | |
| | FG-FO | | - | No | No | No | |
| | FNSCBA-CGT | | - | No | No | No | |
| | BA-TI-MAT CFTC | | - | No | No | No | |
| | Fibopa CFE-CGC | | CEC European Managers ¹⁴² | No | No | No | |
| HR | SSSH | | - | No | No | No | |
| | HRSINDSUM | | - | No | No | No | |
| HU | ÉFÉDOSZSZ | | - | No | No | No | |
| IE | SIPTU | | IndustriALL | Yes | Yes | Yes | |
| IT | Fillea-CGIL | | - | No | No | No | |
| | Filca-CISL | | - | No | No | No | |
| | Feneal-UIL | | - | No | No | No | |
| LT | LBMA DPS | | - | No | No | No | |
| | LMPF | | - | No | No | No | |
| LU | OGB-L | | - | No | No | No | |
| | LCGB-Indusid | | - | No | No | No | |
| LV | LMNA | | - | No | No | No | |
| MT | GWU | | EFFAT, EPSU, ETUC, ETUF, Eurocadres, EMF, EMCF, SCECBU | Yes | No | No | |
| NL | CNV Vakmensen | | - | No | No | No | |
| | FNV | | - | No | No | No | |
| PL | SBiPD NSZZ Solidarnosc | | - | No | No | No | |
| | ZZ Budowlani | | - | No | No | No | |
| PT | Setaccop | | - | No | No | No | |

¹⁴⁰ In IndustriALL.

¹⁴¹ In IndustriALL.

¹⁴² Indirectly through Fibopa CFE-CGC.

| | | | | | | | |
|----|----------------------|--|---|------|------|------|--|
| PT | Feviccom | | - | No | No | No | |
| RO | FSLIL | | - | No | No | No | |
| | Sindicat MEX Suceava | | - | | | | |
| SE | GS | | UNI Graphical and Packaging | Yes | Yes | Yes | The group for social dialogue and working groups such as EWC |
| | Unionen | | IndustriALL, EFFAT, ETF, UNI Global Union | n.d. | n.d. | n.d. | |
| | Ledarna | | - | No | No | No | |
| | SI | | IndustriALL, UNI Europa, Feani | Yes | Yes | Yes | |
| SI | SLGS (Sinles) | | - | No | No | No | |
| | Independence KNSS | | - | No | No | No | |
| | Sinles Podgorje | | - | No | No | No | |
| | Alternativa Podgorje | | - | No | No | No | |
| SK | OZ DLV | | - | No | No | No | |

Notes: MS, Member State; n.d., no data; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 59 presents 12 European trade union organisations not represented on the ESSDC, to which trade unions from the furniture sector are affiliated. IndustriALL Europe has 10 affiliated sectoral trade unions from 9 Member States. These are GPA in Austria, Federation of Light Industry Podkrepa in Bulgaria, OBIEK-SEK in Cyprus, 3F in Denmark, Teollisuusliitto in Finland, IG Metall in Germany, SIPTU in Ireland, ELA in Spain and Unionen and SI in Sweden. All trade unions except four (AT, BG, CY and trade union SI in SE) are also affiliated to the EFBWW. UNI Europa is a global union federation with affiliates in 150 countries. This European organisation has seven members from the furniture sector in five Member States. These are GPA in Austria, 3F in Denmark, Teollisuusliitto in Finland, UGT-FICA and CCOO del Hábitat in Spain and Unionen and SI in Sweden. All trade unions besides GPA and SI are also affiliated to the EFBWW. EFFAT has five members from the furniture sector. These are GPA in Austria, 3F in Denmark, Teollisuusliitto in Finland, GWU in Malta and Unionen in Sweden. EPSU is the European social partner organisation for workers in the hospital and healthcare sector throughout the EU. It has four members from the furniture sector, from four Member States. These are GPA in Austria, 3F in Denmark, GWU in Malta and CCOO del Hábitat in Spain. All trade unions besides GPA are also affiliated to the EFBWW. ETF has three affiliated sectoral trade unions from three Member States. These are GPA in Austria, 3F in Denmark and Unionen in Sweden. CEC European Managers has two members from the furniture sector, in two Member States. These

are 3F in Denmark and Fibopa CFE-CGC in France. The other European trade union organisations in Table 59 have only one trade union each from the furniture sector.

Table 59: Other European associations to which sectoral trade unions are affiliated

| Other EU trade union organisations | | | Member States with an affiliate according to organisation websites | Member States with a furniture sector affiliate |
|--|--|---|--|---|
| Abbreviation | Full name | Assessment of sector-relatedness | | |
| IndustriALL Europe | IndustriALL European Trade Union | IndustriALL European Trade Union is a federation of trade unions representing manual and non-manual workers in such sectors as aerospace, automotive, basic metals, chemicals and basic materials, defence, energy, ICT, mechanical engineering, pharmaceuticals, shipbuilding, textiles, clothing and leather footwear. IndustriALL Europe represents 80 national trade union affiliates in 38 European countries. | 27 | 9 (AT, BG, CY, DE, DK, ES, FI, IE, SE). All trade unions besides those in AT, BG and CY, and trade union SI in SE, are affiliated to the EFBWW. |
| UNI Europa (UNI Global) | UNI Europa (UNI Global Union) | UNI Global is a global union federation with affiliates in 150 countries. In Europe, it represents 272 national trade unions in 50 countries. It organises trade unions in the services sectors, representing agency workers and workers in care, cleaning/security, commerce, finance, gaming, graphics and packaging, hair and beauty, ICT and related services, media and entertainment, post and logistics and tourism. | n.d. | 5 (AT, DK, ES, FI, SE). All trade unions besides those in AT and trade union SI in SE are affiliated to the EFBWW. |
| UNI Graphical and Packaging (UNI Global) | UNI Graphical and Packaging | UNI Graphical and Packaging brings together unions representing a wide array of workers, including those from publishing, printing, packaging and the paper converting sector. | n.d. | 1 (SE); affiliated to the EFBWW. |
| EFFAT | European Federation of Food, Agriculture, and Tourism Trade Unions | EFFAT represents all workers in the food, agriculture, tourism and domestic workers sectors and those in related sectors, services and activities in Europe. | 26 (without EE) | 5 (AT, DK, FI, MT, SE). All trade unions besides those in AT are affiliated to the EFBWW. |
| EPSU | European Public Service Union | EPSU is the European social partner organisation for workers in the hospital and healthcare sector throughout the EU. | 27 | 4 (AT, DK, ES, MT). All trade unions besides those in AT are affiliated to the EFBWW. |

Representativeness of the European social partner organisations: Furniture sector

| | | | | |
|------------------------|---|--|---|---|
| ETF | European Transport Workers' Federation | ETF is a pan-European trade union organisation that embraces transport trade unions from the EU, the European Economic Area and central and eastern European countries. | 27 | 3 (AT, DK, SE). All trade unions besides GPA in AT are affiliated to the EFBWW. |
| EFJ | European Federation of Journalists | EFJ is the largest organisation of journalists in Europe. It organises journalists working in all parts of the media across Europe. | 27 | 1 (AT) is not affiliated to the EFBWW. |
| CEC European Managers | Confédération Européenne des Cadres | CEC represents around one million managers in Europe through its national and sectoral federations. | 10 (CZ, DE, DK, EL, ES, FR, HU, IT, PT, SE) | 2 (DK, FR). Trade union 3F in DK is affiliated to the EFBWW. |
| European part of UITBB | Union internationale des syndicats des travailleurs du bâtiment, du bois et des matériaux de construction | UITBB is composed of trade union organisations of working people in the building, wood, building materials and allied industries. | n.d. | 1 (EL) is not affiliated to the EFBWW. |
| ETUC | European Trade Union Confederation | ETUC comprises 92 national trade union confederations in 39 countries and 10 European trade union federations: EAEA, Eurocop, EFBWW/FETBB, EFFAT, EFJ/FEJ, IndustriALL, EPSU, ETF, ETUCE/CSEE, UNI-Europa. | 27 | 1 (MT); affiliated to the EFBWW. |
| Eurocadres | Eurocadres | Eurocadres organises managers and professionals in all branches of industry, public and private services and administrative departments. | 22 (without CY, LT, LV, SK, SV) | 1 (MT); affiliated to the EFBWW. |
| Feani | European Federation of National Engineering Associations | Feani is a federation of professional engineers that unites national engineering associations from 33 European Higher Education Area countries. | 23 (without FI, LT, LU, LV) | 1 (SE) is not affiliated to the EFBWW. |

Notes: ICT, information and communications technology; n.d., no data.

Sources: Home pages of trade union organisations, 2022; Network of Eurofound Correspondents' national contributions to this study, 2021

Since none of the other European trade union organisations claims any representativeness for the furniture sector, we may assume that the affiliation of these national trade unions is for their members in other sectors.

3.4. Representativeness of EFIC in the furniture sector

EFIC has national confederations as full members, and companies and clusters as associated members, representing the furniture sector in Europe. EFIC is one of the European social partners involved in the ESSDC and participates actively in the EU social dialogue. According to the data provided by the confederation, it represents more than 70% of the total turnover of the industry in Europe.¹⁴³ In the EU27, it has 12 national employer organisations and 3 business associations as full members (altogether 15 full members in 14 Member States) and 5 clusters of companies that are associated members (in two additional Member States). In July 2023, a sixth cluster joined, UNEmadera from Spain.

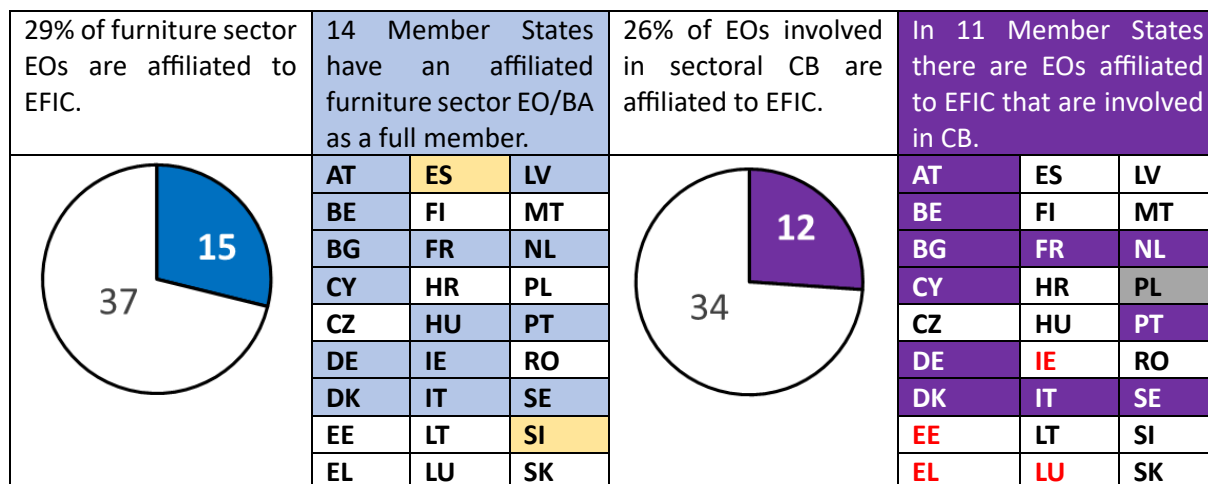
There is one such cluster from the Catalan region of Spain (35 companies): AMBIT (previously called Cenfim). There are two such clusters of companies in Italy, one for the Tuscany region (400 companies) and one for the Friuli Venezia Giulia region (2,000 companies). For Denmark, there is a lifestyle and design cluster (330 companies) affiliated to EFIC, and from Slovenia a wood industry cluster (86 companies), called Lesarski Grozd. These clusters are state-funded structures aiming to represent certain business interests, but the companies in them are not members of EFIC, as they do not pay membership fees. The clusters themselves, as associated members of EFIC, pay membership fees. However, they cannot be considered employer organisations, and therefore are not considered to contribute to the representativeness of EFIC in terms of representing the interests of the employers in the sector, because these clusters do not play any role in representing the companies on issues related to working conditions or industrial relations.

The 12 national employer organisations and the 3 business associations that are member organisations, not the clusters that are associated to EFIC, are included in Figure 10. On 10 July 2023, EFIC announced in a press release that the Spanish employer organisation UNEmadera had joined as a member of EFIC. Because this study was produced before this date, UNEmadera is not included in the tables.

Looking at the changes in the EFIC membership strength between the 2016 furniture sector representativeness study and this 2023 one, EFIC has increased the number of Member States with an affiliated organisation from 10 in 2016 to 15 in 2023. The five additional Member States in which EFIC has an affiliated organisation are Bulgaria, Cyprus, Ireland, Latvia and Spain.

¹⁴³ See the EFIC website.

Figure 10: Scoreboard of the representativeness of EFIC in the furniture sector



Notes: Blue shading denotes Member States where there is an affiliate. Yellow shading denotes countries where EFIC does not have an affiliated employer organisation but where there is a cluster that is an associated member – this is the case for Denmark, Italy, Slovenia and Spain. However, yellow shading is only used for Slovenia and Spain, because in those two countries the cluster is only an associated member. In Denmark and Italy, there is an EO affiliated to EFIC, as a full member, which is why the shading is blue there. Purple shading denotes the Member States where there is an affiliate involved in CB. Red font denotes Member States with no furniture sector CB (Estonia, Greece, Ireland, Luxembourg and Poland). Poland is marked grey on the right because no established CB practice exists, although talks and company-level negotiations in IKEA, the largest Polish furniture company, were ongoing, but had not reached an agreement by the time this study was finalised in August 2023. July 2023 update: In Spain, UNEmadera joined EFIC in July 2023. CB, collective bargaining; EO, employer organisation.

There is no national sectoral employer organisation in Luxembourg. For 11 other Member States, there is a sectoral employer organisation but it is not affiliated to EFIC. This is the case for Croatia, Czechia, Estonia, Finland, Greece, Lithuania, Malta, Poland, Romania, Slovakia and Slovenia. For Slovenia, there is a cluster of companies associated to EFIC, but no sectoral employer organisation. For Spain, since 2021 a cluster of companies (AMBIT) has been associated to EFIC, and since July 2023 a sectoral employer organisation (UNEmadera) has been affiliated. Two Member States with relatively large proportions of the EU sectoral workforce – Poland (21.9%) and Romania (7.1%) – do not have a sectoral employer organisation represented in EFIC. IKEA of Sweden is an associated member of EFIC. IKEA is also the largest sectoral employer in Poland, although it is not clear whether IKEA also represents IKEA Poland as an employer. There is also no organisation affiliated to EFIC in Lithuania, where 3.6% of the EU sectoral workforce is employed.

EU employer organisations and business associations affiliated to EFIC and parts of the furniture sector organised by these organisations/associations are presented in Table 60. Only two employer organisations do not cover all subsectors. Producers of mattresses are not organised by FVHI (Austria) or Fabunio (Hungary).

Table 60: Width of membership domains of sectoral employer organisations affiliated to EFIC

| MS | Employer organisation or business association | Affiliation | | Parts of the sector organised | | | | | |
|---|--|----------------|------------|-------------------------------|-------------------|--------------|----------------|------------------|--------------|
| | | EFIC | UEA | Membership domain covered | | | | | |
| | | | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| EU27 | 12 EOs/3 BAs in 14 MSs | 15 in 14 MSs | | 15 in 14 MSs | 15 in 14 MSs | 13 in 12 MSs | 15 in 14 MSs | 15 in 14 MSs | 15 in 14 MSs |
| AT | FVHI | | | | | | | | |
| BE | Fedustria | | | | | | | | |
| BG | Branch Chamber of Woodworking and Furniture Industry | | | | | | | | |
| CY | Pasyvex | | | | | | | | |
| DE | VDM | | | | | | | | |
| DK | TMI | | | | | | | | |
| | DI | | | | | | | | |
| FR | l'Ameublement français | | | | | | | | |
| HU | Fabunio | | | | | | | | |
| IE | IWFMN | | | | | | | | |
| IT | FLA | | | | | | | | |
| LV | LKF | | | | | | | | |
| NL | CBM | | | | | | | | |
| PT | AIMMP | | | | | | | | |
| SE | TMF | | | | | | | | |
| 5 clusters affiliated to EFIC as associated members | | | | | | | | | |
| DK | Lifestyle and Design Cluster | | | | | | | | |
| ES ¹⁴⁴ | AMBIT ¹⁴⁵ | As of May 2021 | Until 2021 | | | | | | |
| IT | dID – Distretto Interni e Design – Region of Tuscany | | | | | | | | |
| | Wood Furniture Cluster FVG – Region of Friuli Venezia Giulia | | | | | | | | |
| SI | Wood Industry Cluster | | | | | | | | |

Notes: Orange shading indicates full members, while yellow shading denotes associated members. Green shading denotes a positive response. Organisations with names in bold are business associations. BA, business association; EO, employer organisation; MS, Member State.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

¹⁴⁴ For Spain, UNEmadera joined EFIC in July 2023. This is not reflected in this table.

¹⁴⁵ AMBIT used to be called Cenfim. Cenfim's legal name was, and AMBIT's legal name still is, 'Centre de difusió tecnològica fusta i moble de Catalunya'. It became a member of EFIC in May 2021 and has not since been a member of any other social partner organisation. Before May 2021, Cenfim was affiliated to the UEA.

EFIC represents employer organisations/business associations from 14 Member States covering all parts of the furniture sector and company size groups (Table 61). Adding the Clusters of Companies affiliated to EFIC to its membership domain, brings the total number of Member States with a member organisation to 16 Member States.

Table 61: Company size groups in the employer organisations affiliated to EFIC

| MS | Employer organisation or business association | Affiliation | | Parts of the sector organised | | | |
|-----------------------------|--|--------------|-----------|-------------------------------|-----------------|------------------|----------------|
| | | EFIC | UEA | Company size group | | | |
| | | | | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees |
| EU27 | 12 EOs/3 BAs in 14 MSs | 15 in 14 MSs | 1 in 1 MS | 13 in 12 MSs | 15 in 14 MSs | 15 in 14 MSs | 14 in 13 MSs |
| AT | FVHI | | | | | | |
| BE | Fedustria | | | | | | |
| BG | Branch Chamber of Woodworking and Furniture Industry | | | | | | |
| CY | Pasyvex | | | | | | |
| DE | VDM | | | | | | |
| DK | TMI | | | | | | |
| | DI | | | | | | |
| FR | l'Ameublement français | | | | | | |
| HU | Fabunio | | | | | | |
| IE | IWFMN | | | | | | |
| IT | FLA | | | | | | |
| LV | LKF | | | | | | |
| NL | CBM | | | | | | |
| PT | AIMMP | | | | | | |
| SE | TMF | | | | | | |
| Clusters affiliated to EFIC | | | | | | | |
| DK | Lifestyle and Design Cluster | | | | | | |

Representativeness of the European social partner organisations: Furniture sector

| ES ¹⁴⁶ | AMBIT ¹⁴⁷ | As of May 2021 | Until May 2021 | | | | |
|-------------------|--|----------------|----------------|-----|-----|-----|----|
| IT | dID – Distretto Interni e Design – Region of Tuscany | | | 75% | 20% | 3% | 2% |
| | Wood Furniture Cluster FVG – Region of Friuli Venezia Giulia | | | | | | |
| SI | Wood Industry Cluster | | | 18% | 41% | 40% | 1% |

Notes: Orange shading indicates full members, while yellow shading denotes associated members; green shading denotes a positive response. Organisations with names in bold are business associations. BA, business association; EO, employer organisation; MS, Member State.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

In half of the affiliated organisations, the numbers of members have increased in recent years. The number of affiliates has decreased in only two organisations (Branch Chamber of Woodworking and Furniture Industry and TMI) (Table 62).

Table 62: Membership strength of the employer organisations affiliated to EFIC

| MS | Employer organisation or business association | Affiliation | | Members (absolute number or % of employees in the sector covered by the trade union) | Exact number | Estimated number | Drawn from a regional database | Not disclosed | Membership trend |
|-----------|--|-------------|-----|--|--------------|------------------|--------------------------------|---------------|------------------|
| | | EFIC | UEA | | | | | | |
| AT | FVHI | | | 50 | | X | | | Stable |
| BE | Fedustria | | | 350 | X | | | | n.d. |
| BG | Branch Chamber of Woodworking and Furniture Industry | | | 200 | | X | | | Decreasing |
| CY | Pasyvex | | | 36 | | X | | | Increasing |
| DE | VDM | | | Around 1,000 | | | X | | Stable |

¹⁴⁶ For Spain, UNEmadera joined EFIC in July 2023. As this was outside the study period, UNEmadera is not included in this table.

¹⁴⁷ AMBIT used to be called Cenfim.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | | | |
|------------------------------------|---|----------------|----------------|--------------------|---|---|--|--|------------|
| DK | TMI | | | 100 ¹⁴⁸ | X | | | | Decreasing |
| | DI | | | 150 ¹⁴⁹ | X | | | | Increasing |
| FR | l'Ameublement français | | | 380 | X | | | | Increasing |
| HU | Fabunio | | | 33 | X | | | | Increasing |
| IE | IWFMN | | | 73 | X | | | | Increasing |
| IT | FLA | | | 2,100 | X | | | | Stable |
| LV | LKF | | | 15 (2%) | X | | | | Stable |
| NL | CBM | | | >520 | | X | | | Increasing |
| PT | AIMMP | | | Approximately 132 | X | | | | Increasing |
| SE | TMF | | | 143 | X | | | | Stable |
| Clusters affiliated to EFIC | | | | | | | | | |
| DK | Lifestyle and Design Cluster | | | 330 | | X | | | |
| ES ¹⁵⁰ | AMBIT¹⁵¹ | As of May 2021 | Until May 2021 | 35 | | X | | | Increasing |
| IT | dID – Distretto Interni e Design – Region of Tuscany | | | 400 | | X | | | |
| | Wood Furniture Cluster FVG – Region of Friuli Venezia Giulia | | | >2,000 | | X | | | |
| SI | Wood Industry Cluster | | | 86 | | X | | | |

Notes: Orange shading indicates full members, while yellow shading denotes associated members. Organisations with names in bold are business associations. MS, Member State; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

It is worth noting that all organisations affiliated to EFIC are considered representative in the Member States. In the case of seven organisations, representativeness is based only on mutual recognition, while for three it is based only on legal requirements. For four organisations, it is based on both mutual recognition and legal requirements (FVHI, Fedustria, l'Ameublement français, CBM). Regarding the

¹⁴⁸ According to data provided by a representative of EFIC, there are 350 members.

¹⁴⁹ According to data provided by a representative of EFIC, there are 19,000 members.

¹⁵⁰ For Spain, UNEmadera joined EFIC in July 2023. As this was outside the study period, UNEmadera is not included in this table.

¹⁵¹ AMBIT used to be called Cenfim.

involvement of EFIC's members in social dialogue, 10 out of 16 take part in bipartite or tripartite social dialogue related to the furniture sector, and 8 of them are also involved in MEB. Almost all organisations take part in consultation with the government, either on an ad hoc basis or regularly (Table 63).

Table 63: Status of national employer organisations affiliated to EFIC

| MS | Employer organisation or business association | Affiliation | | Involvement in collective bargaining | | Is the organisation considered representative in the country? | Type of recognition: LR or MR | Involvement of the EO/BA in bipartite or tripartite SD related to the furniture sector | Involvement of the EO/BA in paritarian organisations | Number of employees/staff | Type of consultation with government |
|------|--|--------------|-----------|--------------------------------------|------------|---|-------------------------------|--|--|---------------------------|--------------------------------------|
| | | EFIC | UEA | MEB | SEB | | | | | | |
| EU27 | 12 EOs/3 BAs in 14 MSs | 15 in 14 MSs | 1 in 1 MS | 11 in 10 MSs | 2 in 2 MSs | 15 in 14 MSs | | 10 in 9 MSs | 12 in 11 MSs | | |
| AT | FVHI | | | | | Yes | LR, MR | Yes | No | 15 ¹⁵² | Ad hoc and regular |
| BE | Fedustria | | | | | Yes | LR, MR | Yes | Yes | 28 | Regular |
| BG | Branch Chamber of Woodworking and Furniture Industry | | | | | Yes | LR | No | No | 4 | - |
| CY | Pasyvex | | | | | Yes | MR | No | Yes | 0 ¹⁵³ | Regular |
| DE | VDM | | | | | Yes | MR | Yes | Yes | 20 | Regular |
| DK | TMI ¹⁵⁴ | | | | | Yes | MR | Yes | Yes | 5 | Ad hoc |
| | DI | | | | | Yes | MR | Yes | Yes | About 900 | Regular |
| FR | l'Ameublement français | | | | | Yes | LR, MR | Yes | Yes | 20 | Regular for furniture, ad hoc |

¹⁵² Only one is responsible for the furniture sector.

¹⁵³ Administration is handled by the officers of the Cyprus Employers and Industrialists Federation (OEB).

¹⁵⁴ TMI takes part in collective bargaining through DI.

| | | | | | | | | | | | for other subjects |
|----|--------------|--|--|--|-----|--------|-----|-----|----|---------|--------------------|
| HU | Fabunio | | | | Yes | MR | No | No | 3 | Ad hoc | |
| IE | IWFMN | | | | Yes | n.d. | Yes | Yes | 2 | Ad hoc | |
| IT | FLA | | | | Yes | MR | Yes | Yes | 40 | Regular | |
| LV | LKF | | | | Yes | LR | Yes | Yes | 2 | Ad hoc | |
| NL | CBM | | | | Yes | LR, MR | Yes | Yes | | Regular | |
| PT | AIMMP | | | | Yes | MR | No | Yes | 17 | Ad hoc | |
| SE | TMF | | | | Yes | LR | No | Yes | 22 | Regular | |

Notes: Orange and purple shading denote a positive response. Organisations with names in bold are business associations. BA, business association; EO, employer organisation; LR, formal/legal requirements; MR, mutual recognition; MS, Member State; n.d., no data; SD, social dialogue.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

The involvement of employer organisations/business associations in collective bargaining is almost perfectly aligned to sectoral membership domain coverage. For Pasyvex the membership domain (table 61) not completely correspond to the parts of the furniture sector for which it is doing collective bargaining (Table 64). None of the associated clusters is involved in collective bargaining.

Table 64: Involvement of employer organisations affiliated to EFIC in collective bargaining – parts of the furniture sector, 2021

| MS | Employer organisation/business association | Affiliation | | Parts of the furniture sector | | | | | |
|------|--|--------------|-----------|-------------------------------|-------------------|-------------|----------------|------------------|--------------|
| | | EFIC | UEA | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| EU27 | 12 EOs/3 BAs in 14 MSs | 15 in 14 MSs | 1 in 1 MS | 12 in 11 MSs | 12 in 11 MSs | 10 in 9 MSs | 12 in 11 MSs | 12 in 11 MSs | 12 in 11 MSs |

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | | | |
|----|--|--|--|------|------|------|------|------|------|
| AT | FVHI | | | | | n.a. | | | |
| BE | Fedustria | | | | | | | | |
| BG | Branch Chamber of Woodworking and Furniture Industry | | | | | | | | |
| CY | Pasyvex | | | | | | | | |
| DE | VDM | | | | | | | | |
| DK | TMI | | | | | | | | |
| | DI | | | | | | | | |
| FR | l'Ameublement français | | | | | | | | |
| HU | Fabunio | | | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| IE | IWFMN | | | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| IT | FLA | | | | | | | | |
| LV | LKF | | | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| NL | CBM | | | | | | | | |
| PT | AIMMP | | | | | | | | |
| SE | TMF | | | | | | | | |

Notes: Orange and purple shading denote a positive response. Organisations with names in bold are business associations. BA, business association; EO, employer organisation; MS, Member State; n.a., not applicable; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

As shown in Table 65, members of almost all company size groups covered by employer organisations/business associations are also covered by collective bargaining. In the case of Pasyvex, only small and medium-sized companies are covered.

Table 65: Involvement of employer organisations affiliated to EFIC in collective bargaining – company size group, 2021

| MS | Employer organisation/business association | Affiliation | | Company size group | | | |
|-------------|---|---------------------|------------------|--------------------|---------------------|---------------------|---------------------|
| | | EFIC | UEA | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees |
| EU27 | 12 EOs/3 BAs in 14 MSs | 15 in 14 MSs | 1 in 1 MS | 10 in 9 MSs | 12 in 11 MSs | 11 in 10 MSs | 11 in 10 MSs |
| AT | FVHI | | | | | | |
| BE | Fedustria | | | | | | |
| BG | Branch Chamber of Woodworking and Furniture Industry | | | | | | |
| CY | Pasyvex | | | | | | |
| DE | VDM | | | | | | |
| DK | TMI¹⁵⁵ | | | | | | |
| | DI | | | | | | |
| FR | l'Ameublement français | | | | | | |
| HU | Fabunio | | | n.a. | n.a. | n.a. | n.a. |
| IE | IWFMN | | | n.d. | n.d. | n.d. | n.d. |
| IT | FLA | | | | | | |
| LV | LKF | | | n.a. | n.a. | n.a. | n.a. |
| NL | CBM | | | | | | |
| PT | AIMMP | | | | | | |
| SE | TMF | | | | | | |

Notes: Orange and purple shading denote a positive response. Organisations with names in bold are business associations. BA, business association; EO, employer organisation; MS, Member State; n.a., not applicable; n.d., no data.

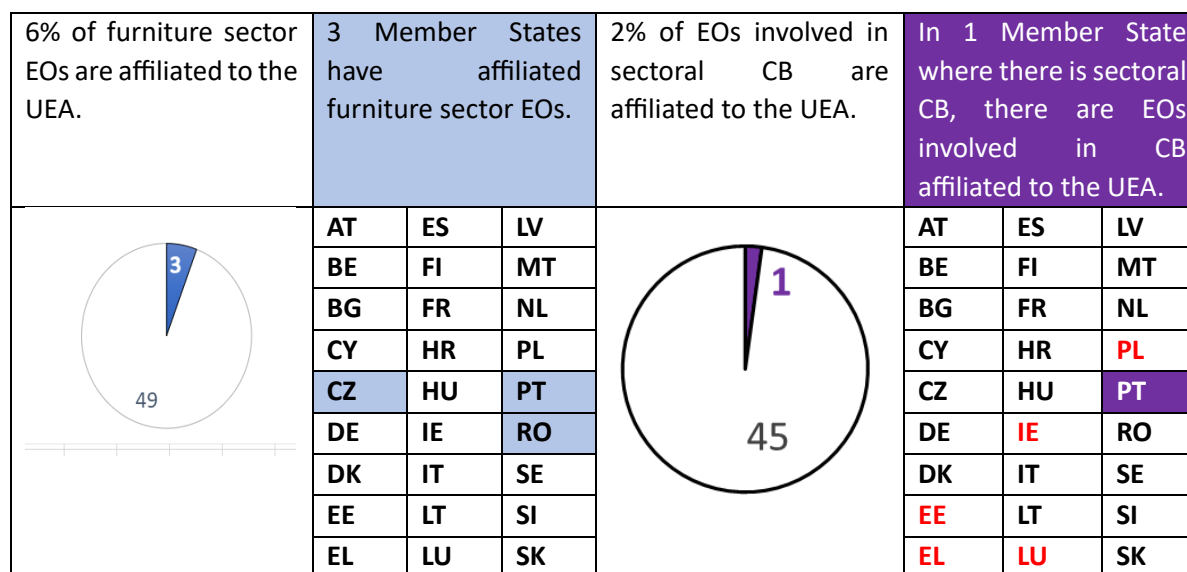
Source: Network of Eurofound Correspondents' national contributions to this study, 2021

¹⁵⁵ TMI takes part in collective bargaining through DI.

3.5. Representativeness of the UEA in the furniture sector

The UEA brings together European employer organisations and business associations representing the furniture sector. The UEA is one of the European social partners involved in the ESSDC. One of the main goals of the federation is to maintain and promote permanent contact between the member industrial organisations and to act as the voice of the furniture sector in dialogue with other trade organisations, all EU authorities and international organisations (UEA, undated). The UEA has three member organisations in the EU27, in Czechia, Portugal and Romania.

Figure 11: Scoreboard of the representativeness of the UEA in the furniture sector



Notes: Red font denotes Member States with no furniture sector CB (EE, EL, IE, LU and PL). Blue shading denotes Member States where there is an affiliate. Purple shading denotes Member States where there is an affiliate involved in CB. CB, collective bargaining; EO, employer organisation.

The Polish OIGPM was an associate member of the UEA until 2016; it is no longer affiliated to the UEA. In Spain, a cluster of companies (Cenfim) was affiliated until May 2021; Cenfim is now only affiliated to EFIC (no longer to the UEA). In 2023, Cenfim changed its name to AMBIT.

Information about the parts of the sector covered by the remaining three associations affiliated to the UEA is presented in Table 66.

Table 66: Width of membership domains of sectoral employer organisations affiliated to the UEA

| MS | Employer organisation or business association | Parts of the sector organised | | | | | |
|------|---|-------------------------------|-------------------|------------|----------------|------------------|------------|
| | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| EU27 | 3 EOs/BAs in 3 MSs | 3 in 3 MSs | 3 in 3 MSs | 3 in 3 MSs | 3 in 3 MSs | 2 in 2 MSs | 3 in 3 MSs |
| CZ | AČN | | | | | | |
| PT | APIMA | | | | | | |

| | | | | | | | |
|----|------|--|--|--|--|--|--|
| RO | APMR | | | | | | |
|----|------|--|--|--|--|--|--|

Notes: Green shading denotes a positive response. BA, business association; EO, employer organisation; MS, Member State.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Based on information provided in Tables 66 and 67, almost all parts of the furniture sector and all company size groups are organised by the UEA. The garden furniture subsector is not covered by AČN.

Table 67: Company size groups in the employer organisations affiliated to the UEA

| MS | Employer organisation or business association | Parts of the sector organised | | | |
|------|---|-------------------------------|-----------------|------------------|----------------|
| | | Company size group | | | |
| | | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees |
| EU27 | 3 EOs/BAs in 3 MSs | 3 in 3 MSs | 3 in 3 MSs | 3 in 3 MSs | 3 in 3 MSs |
| CZ | AČN | | | | |
| PT | APIMA | | | | |
| RO | APMR | | | | |

Notes: Green shading denotes a positive response. BA, business association; EO, employer organisation; MS, Member State.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Numbers of members in the organisations differ significantly. The highest number of members was noted in APIMA, and the smallest in AČN. It is worth noting that the numbers of members in all employer organisations/business associations have increased or been stable in recent years (Table 68).

Table 68: Membership strength of the employer organisations affiliated to the UEA

| MS | Employer organisation or business association | Members (absolute number or % of employees in the sector covered by the trade union) | Exact number | Estimated number | Drawn from a regional database | Not disclosed | Membership trend |
|----|---|--|--------------|------------------|--------------------------------|---------------|------------------|
| CZ | AČN | 61 | X | | | | Stable |
| PT | APIMA | 250 | X | | | | Increasing |
| RO | APMR | 216 | X | | | | Stable |

Note: MS, Member State.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Two of the three organisations are considered to be representative in their countries and are recognised on a mutual basis (Table 69). In Czechia, the representativeness of social partners is not regulated by law, so it is not possible to provide any data for AČN. However, AČN is the only organisation involved in bipartite or tripartite social dialogue related to the furniture sector, and one of the two employer organisations involved in paritarian organisations, together with the Romanian APMR. Regarding involvement in collective bargaining, only the Portuguese APIMA takes part in MEB and is consulted by the government regularly.

Table 69: Status of national employer organisations affiliated to the UEA

| MS | Employer organisation or business association | Involvement in collective bargaining | | Is the organisation considered representative in the country? | Type of recognition LR or MR | Involvement of the EO/BA in bipartite or tripartite SD related to the furniture sector | Involvement of the EO/BA in paritarian organisations | Number of employees/staff | Type of consultation with government |
|------|---|--------------------------------------|-----|---|------------------------------|--|--|---------------------------|--------------------------------------|
| | | MEB | SEB | | | | | | |
| EU27 | 3 EOs/BAs in 3 MSs | 1 in 1 MS | 0 | 2 in 3 MSs | | 1 in 1 MS | 2 in 2 MSs | | |
| CZ | AČN | | | * | | Yes | Yes | 1 | None |
| PT | APIMA | | | Yes | MR | No | No | 6 | Regular |
| RO | APMR | | | Yes | MR | No | Yes | 11 | Ad hoc |

Notes: Purple shading denotes a positive response. * The representativeness of social partners is not regulated by Czech law. BA, business association; EO, employer organisation; LR, formal/legal requirements; MR, mutual recognition; MS, Member State; SD, social dialogue.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Tables 70 and 71 present data on the collective bargaining involvement of employer organisations affiliated to the UEA in relation to subsectors and company size groups. As only APIMA takes part in collective bargaining, these tables are not applicable to the other organisations.

Table 70: Involvement of employer organisations affiliated to the UEA in collective bargaining – parts of the furniture sector, 2021

| MS | Employer organisation/business association | Parts of the furniture sector | | | | | |
|------|--|-------------------------------|-------------------|------------|----------------|------------------|-----------|
| | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| EU27 | 3 EOs/BAs in 3 MSs | 1 in 1 MS | 1 in 1 MS | 1 in 1 MS | 1 in 1 MS | 1 in 1 MS | 1 in 1 MS |
| CZ | AČN | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| PT | APIMA | | | | | | |
| RO | APMR | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |

Notes: Purple shading denotes a positive response. BA, business association; EO, employer organisation; MS, Member State; n.a., not applicable.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 71: Involvement of employer organisations affiliated to the UEA in collective bargaining – company size group, 2021

| MS | Employer organisation/business association | Company size group | | | |
|------|--|--------------------|-----------------|------------------|----------------|
| | | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees |
| EU27 | 3 EOs/BAs in 3 MSs | 1 in 1 MS | 1 in 1 MS | 1 in 1 MS | 1 in 1 MS |
| CZ | AČN | n.a. | n.a. | n.a. | n.a. |
| PT | APIMA | | | | |
| RO | APMR | n.a. | n.a. | n.a. | n.a. |

Notes: Purple shading denotes a positive response. BA, business association; EO, employer organisation; MS, Member State; n.a., not applicable.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

3.6. Sectoral employer organisations/business associations not represented in the furniture ESSDC

This section is dedicated to employer organisations and business associations not represented in the ESSDC. Knowing the status of these organisations/associations may help the committee and the social partners to assess the potential for increased cooperation with the current representatives of the furniture sector. According to the information provided by the national correspondents, 23 employer organisations and 9 business associations representing the furniture sector, in 15 Member States, are not affiliated to EFIC or the UEA. Considering the number of organisations/associations affiliated to EFIC (15) or the UEA (3), the potential for further integration is significant.

As we can see, exactly half of the organisations presented in Table 72 cover all parts of the furniture sector. The highest coverage was noted in the home furniture subsector (25 organisations) followed by the office and shop furniture and the kitchen furniture subsectors (24 organisations each).

Table 72: Width of membership domains of sectoral employer organisations not affiliated to EFIC or the UEA

| MS | Employer organisation or business association | Parts of the sector organised | | | | | |
|------|---|-------------------------------|-------------------|--------------|----------------|------------------|--------------|
| | | Membership domain covered | | | | | |
| | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| EU27 | 23 EOs/9 BAs in 15 MSs | 24 in 15 MSs | 24 in 15 MSs | 19 in 11 MSs | 25 in 15 MSs | 21 in 13 MSs | 22 in 14 MSs |
| AT | BITH | | | | | | |
| | BIMT | | | | | | |
| | FVTI | | | | | | |
| BE | Houtunie Houtbewerkers | | | | | | |
| BG | National Association of Wood Products Companies | | | | | | |
| DE | IBA | | | | | | |
| | Tischler Schreiner Deutschland | | | | | | |
| EE | EMPL | | | | | | |
| | EMTL | | | | | | |
| EL | POVSKX | | | | | | |
| ES | FAMO | | | | | | |
| | UNEmadera | | | | | | |
| | Fevama | | | | | | |

| | | | | | | | |
|----|--------------------------------|------|------|------|------|------|------|
| | Uniema | | | | | | |
| | Asocama | | | | | | |
| | AMC | | | | | | |
| FI | Metsäteollisuus | | | | | | |
| | PTY | | | | | | |
| FR | UNAMA | | | | | | |
| HR | HUP UDPI | | | | | | |
| | DK | | | | | | |
| IT | Unital Confapi | | | | | | |
| | CNA Produzione | | | | | | |
| | Confartigianato Legno e Arredo | | | | | | |
| | Casartigiani | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| | CLAAI | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| LT | LM | | | | | | |
| MT | CoC | | | | | | |
| | MEA | | | | | | |
| SI | ZDS | | | | | | |
| | GZS-ZLPI | | | | | | |
| SK | ZSD SR | | | | | | |

Notes: Green shading denotes a positive response. Organisations with names in bold are business associations. BA, business association; EO, employer organisation; MS, Member State; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

In the case of 14 organisations, all company size groups in the furniture sector were organised. The groups most often covered are those with 10–249 employees, and those least often covered are companies employing at least 250 workers (Table 73).

Table 73: Company size groups in the employer organisations not affiliated to EFIC or the UEA

| MS | Employer organisation or business association | Parts of the sector organised | | | |
|------|---|-------------------------------|-----------------|------------------|----------------|
| | | Company size groups | | | |
| | | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees |
| EU27 | 23 EOs/9 BAs in 15 MSs | 23 in 12 MSs | 25 in 13 MSs | 25 in 13 MSs | 18 in 9 MSs |
| AT | BITH | | | | |

Representativeness of the European social partner organisations: Furniture sector

| | | | | | |
|----|---|------|------|------|------|
| | BIMT | | | | |
| | FVTI | | | | |
| BE | Houtunie Houtbewerkers | | | | |
| BG | National Association of Wood Products Companies | | | | |
| DE | IBA | | | | |
| | Tischler Schreiner Deutschland | n.d. | n.d. | n.d. | n.d. |
| EE | EMPL | | | | |
| | EMTL | | | | |
| EL | POVSKX | | | | |
| ES | FAMO | | | | |
| | UNEmadera | | | | |
| | Fevama | | | | |
| | Uniema | | | | |
| | Asocama | | | | |
| | AMC | | | | |
| FI | Metsäteollisuus | | | | |
| | PTY | | | | |
| FR | UNAMA | | | | |
| HR | HUP UDPI | | | | |
| | DK | | | | |
| IT | Unital Confapi | | | | |
| | CNA Produzione | | | | |
| | Confartigianato Legno e Arredo | | | | |
| | Casartigiani | n.d. | n.d. | n.d. | n.d. |
| | CLAAI | n.d. | n.d. | n.d. | n.d. |
| LT | LM | | | | |
| MT | CoC | | | | |
| | MEA | | | | |
| SI | ZDS | | | | |

| | | | | | |
|-----------|----------|--|--|--|--|
| | GZS-ZLPI | | | | |
| SK | ZSD SR | | | | |

Notes: Green shading denotes a positive response. Organisations with names in bold are business associations. BA, business association; EO, employer organisation; MS, Member State; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Like in the case of organisations affiliated to EFIC or the UEA, in general the numbers of members were stable or had increased in recent years. It should be noted that some organisations (e.g. BITH, UNEmadera) have companies from different sectors as affiliates, so the precise number of members from the furniture sector is not known (Table 74).

Table 74: Membership strength of the employer organisations not affiliated to EFIC or the UEA

| MS | Employer organisation or business association | Members (absolute number or % of employees in the sector covered by the trade union) | Exact number | Estimated number | Drawn from a regional database | Not disclosed | Membership trend |
|----|--|--|--------------|------------------|--------------------------------|---------------|------------------|
| AT | BITH | 10,886 ¹⁵⁶ | | X | | | Increasing |
| | BIMT | n.d. | | | | | Stable |
| | FVTI | Approximately 20 | | | | | Stable |
| BE | Houtunie Houtbewerkers | 1,038 ¹⁵⁷ | X | | | | n.d. |
| BG | National Association of Wood Products Companies | 25 | X | | | | Increasing |
| DE | IBA | 75 | X | | | | Increasing |
| | Tischler Schreiner Deutschland | n.d. | | | | | n.d. |
| EE | EMPL | 4 | n.d. | n.d. | n.d. | n.d. | Increasing |
| | EMTL | 28 | | X | | | n.d. |
| EL | POVSKX | Approximately 2,250 ¹⁵⁸ | | X | | | Stable |
| ES | FAMO | 27 | X | | | | Increasing |
| | UNEmadera | 23,300 ¹⁵⁹ | | | X | | Increasing |

¹⁵⁶ This number refers to the woodworking and furniture sectors.

¹⁵⁷ 805 without Houtunie Houtbewerkers personnel.

¹⁵⁸ In three sectors. 50% of its total membership is in the furniture sector.

¹⁵⁹ It includes woodworking, packaging and furniture companies.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | |
|-----------|--------------------------------|-------|------|------|------|------|------------|
| | Fevama | n.d. | | | X | | Stable |
| | Uniema | 45 | | X | | | Increasing |
| | Asocama | 12 | X | | | | Stable |
| | AMC | 108 | X | | | | Increasing |
| FI | Metsäteollisuus | n.d. | | | | | n.d. |
| | PTY | <100 | | X | | | n.d. |
| FR | UNAMA | 139 | | | | | n.d. |
| HR | HUP UDPI | 30% | | X | | | Increasing |
| | DK | 70 | | X | | | Stable |
| IT | Unital Confapi | n.d. | | | | | n.d. |
| | CNA Produzione | n.d. | | | | | n.d. |
| | Confartigianato Legno e Arredo | n.d. | | | | | n.d. |
| | Casartigiani | n.d. | | | | | n.d. |
| | CLAAI | n.d. | | | | | n.d. |
| LT | LM | 30–40 | n.d. | n.d. | n.d. | n.d. | Stable |
| MT | CoC | 3 | X | | | | Stable |
| | MEA | 1 | X | | | | Stable |
| SI | ZDS | 20% | | | | X | Stable |
| | GZS-ZLPI | 70% | | | | X | Increasing |
| SK | ZSD SR | 16 | X | | | | Decreasing |

Notes: MS, Member State; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Almost all organisations/associations are considered representative. Representativeness is based on mutual recognition for 16 of them and on legal requirements for nine of them, with three having both types of recognition. The majority of employer organisations are involved in collective bargaining, and most of them in MEB. Only 12 of the presented organisations, from seven Member States, take part in bipartite or tripartite social dialogue. Consultation with the government is conducted regularly only in four cases, and on an ad hoc basis in eight cases (Table 75).

Table 75: Status of national employer organisations not affiliated to EFIC or the UEA

| MS | Employer organisation or business association | Involvement in collective bargaining | | Is the organisation considered representative in the country? | Type of recognition: LR or MR | Involvement of the EO/BA in bipartite or tripartite SD related to the furniture sector | Involvement of the EO/BA in paritarian organisations | Number of employees/staff | Type of consultation with government |
|-------------------------|--|--------------------------------------|-------------------|---|-------------------------------|--|--|---------------------------|--------------------------------------|
| | | MEB | SEB | | | | | | |
| EU27 | 23 EOs/9 BAs in 15 MSs | 19 in 10 MSs | 2 in 2 MSs | 29 in 14 MSs | | 12 in 7 MSs | 7 in 3 MSs | | |
| AT | BITH | | | Yes | LR, MR | No | No | 5 | Ad hoc |
| | BIMT | | | Yes | LR, MR | No | No | n.d. | n.d. |
| | FVTI | | | Yes | LR, MR | Yes | No | n.d. | Regular |
| BE | Houtunie Houtbewerkers | | | Yes | LR | Yes | Yes | n.d. | Regular |
| BG | National Association of Wood Products Companies | | | Yes | LR | No | No | 0 ¹⁶⁰ | - |
| DE | IBA | | | Yes | LR | No | No | 7 | Ad hoc |
| | Tischler Schreiner Deutschland | | | Yes | MR | No | No | n.d. | n.d. |
| EE¹⁶¹ | EMPL | | | * | | No | No | 4 | Ad hoc |
| | EMTL | | | * | | No | No | 1 | - |
| EL | POVSKX | | | Yes | MR | No | No | 0 ¹⁶² | - |
| ES | FAMO | | | Yes | MR | No | No | n.d. | - |
| | UNEmadera | | | Yes | LR | No | No | n.d. | - |
| | Fevama | | | Yes | MR | No | No | 8 | - |
| | Uniema | | | No | None | No | No | n.d. | - |
| | Asocama | | | Yes | MR | No | No | n.d. | - |
| | AMC | | | Yes | MR | No | No | 4 | - |

¹⁶⁰ Members carry out voluntary work.

¹⁶¹ In Estonia, there are no criteria to distinguish representative organisations from non-representative ones.

¹⁶² Members carry out voluntary work.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | | | |
|----|--------------------------------|--|----------------|-----|------|------|-----|----------|---------|
| FI | Metsäteollisuus | | | Yes | MR | Yes | No | About 40 | Ad hoc |
| | PTY | | | Yes | MR | n.d. | No | 2 | - |
| FR | UNAMA | | | Yes | n.d. | Yes | Yes | n.d. | n.d. |
| HR | HUP UDPI | | ¹⁶³ | Yes | LR | No | No | 4 | Regular |
| | DK | | | Yes | LR | No | No | | - |
| IT | Unital Confapi | | | Yes | MR | Yes | Yes | n.d. | n.d. |
| | CNA Produzione | | | Yes | MR | Yes | Yes | n.d. | n.d. |
| | Confartigianato Legno e Arredo | | | Yes | MR | Yes | Yes | n.d. | n.d. |
| | Casartigiani | | | Yes | MR | Yes | Yes | n.d. | n.d. |
| | CLAAI | | | Yes | MR | Yes | Yes | n.d. | n.d. |
| LT | LM | | | Yes | MR | No | No | 2 | Ad hoc |
| MT | CoC | | | Yes | LR | No | No | Over 20 | - |
| | MEA | | | Yes | LR | No | No | 5 | Ad hoc |
| SI | ZDS | | | Yes | MR | Yes | No | 13 | Ad hoc |
| | GZS-ZLPI | | | Yes | MR | Yes | No | 3 | Ad hoc |
| SK | ZSD SR | | | Yes | LR | Yes | No | 3 | Regular |

Notes: In Croatia, there is no bipartite or tripartite SD related to the furniture sector and no paritarian organisations. There are no paritarian organisations in Malta. * There are no representativeness criteria in Estonia. Purple shading denotes a positive response. Organisations with names in bold are business associations. BA, business association; EO, employer organisation; LR, formal/legal requirements; MR, mutual recognition; MS, Member State; n.d., no data; SD, social dialogue.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Of the 21 employer organisations involved in collective bargaining, of which 19 had available data on their collective bargaining involvement,¹⁶⁴ 11 cover all furniture subsectors. The highest proportions in terms of coverage are found in the home furniture (18 organisations) and kitchen furniture (16 organisations) subsectors. The least covered are employers producing mattresses (by 12 organisations in 7 Member States) (Table 76).

¹⁶³ No SEB because collective bargaining at company level is performed by company trade unions and company management, and negotiations are conducted at company level. The Croatian Employers' Association – Wood and Paper Industry Association supports and advises its members.

¹⁶⁴ For two Italian organisations (Casartigiani and CLAAI) that are involved in collective bargaining, there is no further information on this.

Table 76: Involvement of employer organisations not affiliated to EFIC or the UEA in collective bargaining – parts of the furniture sector, 2021

| MS | Employer organisation/business association | Parts of the furniture sector | | | | | |
|------|---|-------------------------------|-------------------|----------------|-----------------|------------------|-----------------|
| | | Office and shop furniture | Kitchen furniture | Mattresses | Home furniture | Garden furniture | Cabinets |
| EU27 | 32 EOs/BAs in 15 MSs | 15 in 9 MSs | 16 in 11 MSs | 12 in 7 MSs | 18 in 11 MSs | 14 in 9 MSs | 15 in 10 MSs |
| AT | BITH | | | | | | |
| | BIMT | | | | | | |
| | FVTI | | | | | | |
| BE | Houtunie Houtbewerkers | | | | | | |
| BG | National Association of Wood Products Companies | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| DE | IBA | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | Tischler Schreiner Deutschland | | | | | | |
| EE | EMPL | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | EMTL | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| EL | POVSKX | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| ES | FAMO | | | | | | |
| | UNEmadera | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | Fevama | | | | | | |
| | Uniema | | | | | | |
| | Asocama | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | AMC | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| FI | Metsäteollisuus | | | | | | |
| | PTY | | | | | | |
| FR | UNAMA | | | | | | |
| HR | HUP UDPI | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | DK | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| IT | Unital Confapi | | | | | | |
| | CNA Produzione | | | | | | |

| | | | | | | | |
|-----------|--------------------------------|------|------|------|------|------|------|
| | Confartigianato Legno e Arredo | | | | | | |
| | Casartigiani | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| | CLAAI | n.d. | n.d. | n.d. | n.d. | n.d. | n.d. |
| LT | LM | | | | | | |
| MT | CoC | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | MEA | | | | | | |
| SI | ZDS | | | | | | |
| | GZS-ZLPI | | | | | | |
| SK | ZSD SR | | | | | | |

Notes: Purple shading denotes a positive response. Organisations with names in bold are business associations. BA, business association; EO, employer organisation; MS, Member State; n.a., not applicable; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Most company size groups in this category are covered by collective bargaining. The highest proportions were noted among companies employing fewer than 250 workers (17 organisations in 8–10 Member States) (Table 77).

Table 77: Involvement of employer organisations not affiliated to EFIC or the UEA in collective bargaining – company size group, 2021

| MS | Employer organisation/business association | Company size group | | | |
|-------------|--|--------------------|--------------------|---------------------|--------------------|
| | | 1–9 employees | 10–49 employees | 50–249 employees | 250+ employees |
| EU27 | 32 EOs/BAs in 15 MSs | 17 in 8 MSs | 17 in 8 MSs | 17 in 10 MSs | 15 in 7 MSs |
| AT | BITH | | | | |
| | BIMT | | | | |
| | FVTI | | | | |
| BE | Houtunie Houtbewerkers | | | | |
| BG | National Association of Wood Products Companies | n.a. | n.a. | n.a. | n.a. |
| DE | IBA | n.a. | n.a. | n.a. | n.a. |
| | Tischler Schreiner Deutschland | n.d. | n.d. | n.d. | n.d. |
| EE | EMPL | n.a. | n.a. | n.a. | n.a. |

Representativeness of the European social partner organisations: Furniture sector

| | | | | | |
|-----------|--------------------------------|------|------|------|------|
| | EMTL | n.a. | n.a. | n.a. | n.a. |
| EL | POVSKX | n.a. | n.a. | n.a. | n.a. |
| ES | FAMO | | | | |
| | UNEmadera | n.a. | n.a. | n.a. | |
| | Fevama | | | | |
| | Uniema | | | | |
| | Asocama | n.a. | n.a. | n.a. | n.a. |
| | AMC | n.a. | n.a. | n.a. | n.a. |
| FI | Metsäteollisuus | | | | |
| | PTY | | | | |
| FR | UNAMA | | | | |
| HR | HUP UDPI | n.a. | n.a. | n.a. | n.a. |
| | DK | n.a. | n.a. | n.a. | n.a. |
| IT | Unital Confapi | | | | |
| | CNA Produzione | | | | |
| | Confartigianato Legno e Arredo | | | | |
| | Casartigiani | | | | |
| | CLAAI | | n.d. | n.d. | n.d. |
| LT | LM | | | | |
| MT | CoC | n.a. | n.a. | n.a. | n.a. |
| | MEA | | | | |
| SI | ZDS | | | | |
| | GZS-ZLPI | | | | |
| SK | ZSD SR | | | | |

Notes: Purple shading denotes a positive response. Organisations with names in bold are business associations. BA, business association; EO, employer organisation; MS, Member State; n.a., not applicable; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

3.7. Other European associations to which national sectoral employer organisations/business associations are affiliated

Almost half of sectoral employer organisations and business associations (23 out of 52) are affiliated to European associations other than EFIC and the UEA. The most frequently indicated association is CEI-Bois, to which 12 organisations/associations are affiliated. Thirteen organisations/associations are affiliated to other organisations but not to EFIC or the UEA, while 10 were affiliated to both EFIC and other European associations (Table 78). According to the data provided by the national correspondents, none of the organisations affiliated to the UEA is simultaneously affiliated to another European association. More details about the affiliation of national sectoral employer organisations and business associations to other European organisations can be found in Annex 4.

Table 78: Affiliation to the other European associations

| MS | Employer organisation or business association affiliated to European associations other than EFIC and the UEA | Affiliation | | Affiliation to other European associations | Involvement in the management bodies of the other European associations | Payment of affiliation fees to other European associations for the members in the furniture sector | Active involvement in the working groups of the other European associations | Examples |
|------|---|-------------|-----|--|---|--|---|----------|
| | | EFIC | UEA | | | | | |
| EU27 | 23 in 16 MSs | 10 in 9 MSs | | | 9 in 9 MSs | 17 in 15 MSs | 12 in 11 MSs | |
| AT | FVHI | | | CEI-Bois, EOS | Yes ¹⁶⁵ | Yes ¹⁶⁶ | Yes ¹⁶⁷ | |
| BE | Houtunie Houtbewerkers | | | EBC | No | No | No | |
| | Fedustria | | | CEI-Bois, Fefpeb, ETTF, FEP, EPF, Euratex | n.d. | Yes | Yes | |
| DE | VDM | | | CEI-Bois ¹⁶⁸ | n.d. | n.d. | n.d. | |
| | IBA | | | FEMB | Yes | Yes | Yes | |

¹⁶⁵ In CEI-Bois.

¹⁶⁶ In CEI-Bois.

¹⁶⁷ In CEI-Bois.

¹⁶⁸ Partner organisation HDH is a CEI-Bois member.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | | | |
|----|------------------------|--|--|--|--------------------|--------------------|--------------------|------------------------------------|
| DK | TMI | | | CEI-Bois, EOS, Fefpeb, EuroWindor | Yes ¹⁶⁹ | Yes ¹⁷⁰ | Yes ¹⁷¹ | |
| | DI | | | CEI-Bois, EOS ¹⁷² | Yes ¹⁷³ | Yes ¹⁷⁴ | Yes ¹⁷⁵ | |
| EE | EMPL | | | CEI-Bois | No | Yes | No | |
| ES | FAMO | | | FEMB | No | Yes | Yes | |
| | Asocama | | | EBIA | Yes | Yes | Yes | |
| FI | Metsäteollisuus | | | CEI-Bois | n.d. | Yes | n.d. | |
| FR | l'Ameublement français | | | FEMB | No | Yes | No | |
| HR | HUP UDPI | | | BusinessEurope | Yes | Yes | No | |
| | DK | | | CEI-Bois | n.d. | n.d. | n.d. | |
| IT | FLA | | | FEMB, FEP, Europanels, ETTF, Lighting Europe, ES-SO, Fefpeb, EBIA, | Yes | Yes | Yes | |
| LV | LKF | | | CEI-Bois, EOS, Bioenergy Europe | No | Yes ¹⁷⁶ | Yes ¹⁷⁷ | |
| MT | CoC | | | Enterprise Europe Network | No | No | No | |
| | MEA | | | SGL Europe, IOE, Businessmed | Yes ¹⁷⁸ | Yes | Yes | Through participation and feedback |
| PT | AIMMP | | | CEI-Bois | n.d. | n.d. | n.d. | |
| SE | TMF | | | FEMB, CEI-Bois | Yes ¹⁷⁹ | Yes ¹⁸⁰ | Yes ¹⁸¹ | |
| SI | ZDS | | | IOE, BusinessEurope | n.d. | n.d. | n.d. | |

¹⁶⁹ In CEI-Bois.

¹⁷⁰ In CEI-Bois.

¹⁷¹ In CEI-Bois.

¹⁷² In both cases through TMI.

¹⁷³ In CEI-Bois.

¹⁷⁴ In CEI-Bois.

¹⁷⁵ In CEI-Bois.

¹⁷⁶ In CEI-Bois.

¹⁷⁷ In CEI-Bois.

¹⁷⁸ In SGL Europe and Businessmed.

¹⁷⁹ In CEI-Bois.

¹⁸⁰ In CEI-Bois.

¹⁸¹ In CEI-Bois.

| | | | | | | | | |
|-----------|----------|--|--|----------|----|-----|-----|--|
| | GZS-ZLPI | | | CEI-Bois | No | Yes | No | |
| SK | ZSD SR | | | Eumabois | No | Yes | Yes | |

Notes: Organisations with names in bold are business associations. MS, Member State; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

More detailed information on the 17 other European associations is presented in Table 79. This table compiles both data from organisations' websites and information collected by the national correspondents. Eleven Member States have furniture sector representation in CEI-Bois: FVHI (AT), Fedustria (BE), VDM (DE), TMI (DK), DI (DK), EMPL (EE), Metsäteollisuus (FI), DK (HR), LKF (LV), AIMMP (PT), TMF (SE) and GZS-ZLPI (SI). Five have affiliates in FEMB: IBA (DE), FAMO (ES), l'Ameublement français (FR), FLA (IT) and TMF (SE). Between one and three Member States have furniture sector affiliates in these employer organisations.

Table 79: Other European employer organisations

| Other EU employer organisations/business associations | | | Member States with an affiliate according to organisation websites | Member States with a furniture sector affiliate |
|---|--|---|--|--|
| Abbreviation | Full name | Assessment of sector-relatedness | | |
| CEI-Bois | The European Confederation of Woodworking Industries | CEI-Bois represents 20 European and national organisations from 14 countries and is the body backing the interests of the whole industrial European woodworking sector. | 13 (AT, BE, DE, DK, EE, FI, FR, HR, LV, NL, PT, SE, SI) | 11 (AT, BE, DE, DK, EE, FI, HR, LV, PT, SE, SI), most of which (besides EE, FI, HR and SI) also have EFIC affiliates |
| FEMB | European Federation of Office Furniture | FEMB is the European federation and central point of communication for office furniture associations and manufacturers. | 8 (BE, DE, ES, FI, IT, PL, PT, SE) | 5 (DE, ES, FR, IT, SE), of which the last 3 have EFIC affiliates |
| EOS | European Organisation of the Sawmill Industry | EOS represents some 35,000 sawmills in 12 countries across Europe. The sawmills represent around 77% of the total European sawn wood output in the sector. | 9 (AT, BE, DE, DK, FI, FR, LV, RO, SE) | 3 (AT, DK, LV), all of which have EFIC affiliates |
| EBC | European Builders Confederation | EBC represents microenterprises and small and medium-sized businesses of the construction sector. | 15 (AT, BE, ES, FR, HR, HU, IE, IT, LU, LV, NL, PL, RO, SI, SK) | 1 (BE), which does not have ESSDC organisation affiliates |
| Fefpeb | European Federation of Wooden Pallet and Packaging Manufacturers | Fefpeb represents the manufacturers, repairers and traders in the field of wooden packaging and related institutions and organisations. | 14 (AT, BE, CZ, DE, DK, ES, FR, HU, IT, LT, LV, PL, PT, SE) | 2 (BE, DK), both of which also have EFIC affiliates |

Representativeness of the European social partner organisations: Furniture sector

| | | | | |
|---------------------------|--|--|---|--|
| ETTF | European Timber Trade Federation | ETTF is one of the leading timber lobby groups in Europe. It represents product importers' interests across Europe, and the interests of non-importing merchants, distributors and traders. It has 15 member federations. | n.d. | 2 (BE, IT), both of which also have EFIC affiliates |
| FEP | European Parquet Federation | FEP unites European national parquet federations, parquet manufacturers and suppliers to the industry. | n.d. | 1 (IT), which also has an EFIC affiliate |
| EuroWindor | EuroWindor | EuroWindor is an international association representing the interests of the European window, door and facade sector. It has 19 national associations. | n.d. | 1 (DK), which also has an EFIC affiliate |
| EBIA | European Bedding Industries' Association | EBIA represents some 140 mattress manufacturers and suppliers across Europe. | n.d. | 2 (ES, IT), neither of which has ESSDC organisation affiliates |
| BusinessEurope | Confederation of European Business | BusinessEurope is a recognised European social partner standing up for companies. It has 40 members from 35 countries, including EU Member States, the European Economic Area countries and some central and eastern European countries. | 26 (AT, BE, BG, CY, CZ, DE, DK, EE, EL, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, MT, NL, PL, PT, RO, SE, SI) | 2 (HR, SI), neither of which has ESSDC organisation affiliates |
| Europanel | European Panel Federation | Europanel consists of individual wood-based panel producers and national associations of wood-based panel manufacturers. Europanel has members in 25 EU countries. | n.d. | 2 (BE, IT), which also have EFIC affiliates |
| LightingEurope | LightingEurope | LightingEurope is the trade association that represents 30 companies and national associations in the lighting industry in Europe. | 3 (DE, ES, FI) | 1 (IT), which also has an EFIC affiliate |
| Bioenergy Europe | Bioenergy Europe | Bioenergy Europe is a European trade association open to national biomass associations and bioenergy companies active in Europe. This organisation brings together 41 associations and 143 companies. | n.d. | 1 (LV), which also has an EFIC affiliate |
| Enterprise Europe Network | Enterprise Europe Network | Enterprise Europe Network is the largest European network of centres and | n.d. | 1 (MT), which does not have ESSDC organisation affiliates |

| | | institutions that support the development of SMEs. | | |
|-------------|--|--|---|---|
| SGI Europe | Services of General Interest Europe (formerly CEEP) | Members of SGI Europe are enterprises and associations providing services of general interest from across Europe, both public and private, and at national, regional and local levels. | n.d. | 1 (MT), which does not have ESSDC organisation affiliates |
| Eumabois | European Federation of Woodworking Machinery Manufacturers | Eumabois protects the business interests of the European woodworking industry. It represents more than 850 companies. | 11 (AT, BE, CZ, DE, FI, FR, IT, LT, PL, PT, SK) | 1 (SK), which does not have ESSDC organisation affiliates |
| Businessmed | Union of Mediterranean Confederations of Enterprises | This organisation focuses on the private sector in the Mediterranean Basin to increase exchanges between the EU and Mediterranean countries. | 7 (CY, DE, EL, ES, IT, MT, PT) | 1 (MT), which does not have ESSDC organisation affiliates |

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

Sources: *Home pages of employer organisations, 2022; Network of Eurofound Correspondents' national contributions to this study, 2021*

3.8. Negotiation capacity

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

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

EFIC was established in 2006. Recent changes in the organisation concern the additional associated membership of clusters. EFIC has two staff members, both of whom are regularly involved in matters related to European social dialogue and working conditions. About 95% of the EFIC budget comes from

membership fees, with the remainder coming from sponsored events. EFIC has a website with a members-only section. It makes decisions mainly through consensus, while officially 50% of the full membership is needed to make decisions. EFIC regularly negotiates joint opinions with the EFBWW. However, EFIC has no real capacity to negotiate, as there are no standard mandating procedures or decision-making rules to negotiate binding agreements. Before starting the negotiation of a joint opinion, EFIC asks its members for a mandate, through its Executive Board. All members are kept informed during negotiations, and decisions are normally reached by consensus. This approach is not formalised; EFIC decides on a case-by-case basis how to handle the negotiation of European social dialogue texts or initiatives. Within EFIC there is a social dialogue working group, and the Executive Board deals with decisions regarding the ESSDC. There is also a special EFIC working group for EU projects. Before any involvement in ESSDC activities, EFIC's Executive Board is consulted before a text is signed off. Once agreed within EFIC, either the chair of the social dialogue working group in EFIC or its Secretary General will sign the text on behalf of EFIC. Agreed texts are disseminated through press releases and social media, and members are also asked to disseminate joint statements at national level.

The UEA was established in 1950. Recent changes relate to the decreasing membership (see Section 3.5), as it now has only three member organisations in three Member States. The UEA has no staff members, no website and no capacity to negotiate on behalf of its members. If the UEA gets involved in the negotiation of joint opinions, it obtains a mandate to do so during its general meeting. Its members are kept informed by email, and once a decision is taken the General Secretary can sign on its behalf. This ad hoc approach is always applied, but, except for the formalised procedure to make decisions within the UEA in its statutory bodies, there is no formalised capacity to negotiate.

3.9. Effective participation in ESSDC meetings

In 2021, as in 2022, there was one meeting of the furniture ESSDC, in May. Additionally, joint meetings with the woodworking ESSDC were held in October 2021, February 2022 and October 2022.

Table 80: Furniture ESSDC meetings in 2021 and 2022

| ESSDC meeting | Trade union delegates (EFBWW) | | Employer organisation delegates (EFIC & UEA) | |
|---------------------------|---|---|--|---|
| | May 2021 | May 2022 | May 2021 | May 2022 |
| Number of participants | 12 | 10 | 16 | 5 |
| Member States represented | 7 Member States (BE, DE, DK, ES, FI, IT, SE) | 7 Member States (DK, ES, FI, FR, IE, PL, SE) | 14 Member States (BE, BG, CZ, DE, DK, ES, FR, IE, IT, LT, NL, PT, RO, SE) | 5 Member States (FR, IT, NL, PT, RO) |

The EFBWW has affiliated woodworking sector trade unions in 22 Member States. In the 2021–2022 two-year period, trade union delegates from seven Member States participated in the woodworking ESSDC. The EFBWW also has affiliated sectoral trade unions in 15 Member States that did not participate in the meetings in this two-year period. EFIC has affiliated sectoral employer organisations

in 14 Member States plus associated clusters in two other Member States. The UEA has member organisations in three Member States. Together they have affiliates (full members and associated clusters) in 18 different Member States. Employers' delegates participated in 2021 and 2022 from 14 Member States. The four Member States where EFIC has an affiliated organisation but no participant in the meetings in 2021–2022 are Austria, Cyprus, Hungary and Latvia.

Table 81: Participating member organisations in joint furniture and woodworking meetings in 2021 and 2022

| | | |
|---------------------------|---|---|
| 2021–2022 two-year period | Trade union delegates from 10 Member States participated (BE, DE, DK, ES, FI, FR, IE, IT, PL, SE) | The EFBWW also has members in 14 Member States that did not participate in 2021–2022 (AT, BG, CY, CZ, EE, HR, HU, IE, LU, LV, NL, PL, PT, RO) |
| | Employer organisation delegates from 14 Member States participated (BE, BG, CZ, DE, DK, ES, FR, IE, IT, LT, NL, PT, RO, SE) | EFIC also has affiliated organisations in 4 Member States that did not participate in 2021–2022 (AT, CY, HU, LV) |

Besides the single annual meeting of the woodworking ESSDC on its own, there was also one joint meeting in 2021 together with the furniture ESSDC, and in 2022 there were two such joint meetings. In the three joint meetings in this two-year period, there were delegates from the EFBWW from 12 Member States. The 10 Member States where the EFBWW has members but had no delegates attending any of the joint meetings in 2021 or 2022 were Bulgaria, Croatia, Cyprus, Czechia, Estonia, Hungary, Latvia, Luxembourg, Portugal and Romania. For the woodworking sector employers, CEI-Bois and its member organisations participated along with EFIC and the UEA and their member organisations. For all three joint furniture and woodworking meetings together, employers' delegates from 15 different Member States participated.

Table 82: Joint meetings for furniture and woodworking

| Woodworking and furniture joint meetings | Trade union delegates (EFBWW) | Employer organisation delegates (CEI-Bois, EFIC, UEA) |
|---|---|---|
| October 2021 | 15 from 8 Member States | 16 from 13 Member States |
| February 2022 | 7 from 6 Member States | 13 from 8 Member States |
| October 2022 | 11 from 7 Member States | 12 from 10 Member States |
| All three joint meetings together | Participants from 12 Member States (AT, BE, DE, DK, ES, FI, FR, IE, IT, NL, PL, SE) | Participants from 15 Member States (BE, BG, CZ, DE, ES, FI, FR, HR, IE, IT, LV, NL, PT, RO, SE) |

The synergies between the furniture and woodworking social partners date back to a meeting held on 26 May 2014, where the social partners were able to express their views on the subject. The first joint working group meeting was held on 11 March 2016. Since 2016, two joint meetings involving the furniture and woodworking ESSDCs have been held every year, except in 2021. In addition, the furniture ESSDC and the woodworking ESSDC each have separate annual meetings.

4. Conclusions

The EU furniture sector employs about 850,000 workers, which is 0.45% of the 190 million employed people in the EU. The size of the furniture sector workforce is comparable to that of the woodworking sector workforce. The company landscape is also composed mainly of microfirms with fewer than 10 employees (88.5% of all sectoral companies) and small companies with between 10 and 19 employees (6.1%). For the woodworking sector, these proportions are 90.3% and 5%, respectively.

The Member States with the largest furniture sector workforces are Poland (21.9% of the EU sectoral workforce), Germany (16.7%), Italy (12.8%), Romania (7.1%), Spain (6.2%) and France (4.7%). Together, these six Member States have 70% of the EU sectoral workforce. This is similar in the woodworking sector, where Germany has 17.1% of the woodworking sectoral workforce, followed by Poland (15.6%), Italy (8.1%), France (7.3%), Romania (6.1%) and Spain (6.0%). The six EU Member States with the largest furniture sector workforce, covering 70% of the EU furniture sector workforce, also have 60% of the EU woodworking sector workforce.

However, differences between the woodworking sector and the furniture sector include the employment trend. For the woodworking sector, employment slightly decreased between 2011 and 2014, and was relatively stable from 2014 to 2019. Furniture sector employment was stable from 2012 to 2014, but between 2014 and 2018 the workforce increased by 20,000 each year. Most of the new jobs in the furniture sector were created in Poland (about 42,000 extra jobs). The furniture sector workforces also increased in Germany and Lithuania, while the workforces in France and Italy decreased. For the EU furniture sector overall, there was a net increase of about 60,000 jobs between 2013 and 2019.

About 21% of the sectoral workforce is employed in the production of office and shop furniture, 17% in kitchen furniture and 5% in the production of mattresses, but the largest proportion is found in the production of 'other furniture' (64%). This category includes sofas, beds, chairs, seats, cabinets and other furniture for living rooms and gardens.

National trade unions and employer organisations were analysed in Chapter 2 of this report. There are 57 furniture sector trade unions in the EU. Eleven Member States each have two sectoral trade unions and nine Member States each have only one sectoral trade union; the remaining seven Member States each have between three and five sectoral trade unions. On the employers' side, 52 sectoral organisations were identified, in 26 of the 27 Member States. There is no sectoral employer organisation in Luxembourg. Twelve of these Member States each have a single sectoral employer organisation, ten each have two and the remaining four each have between three and seven.

Of the 57 trade unions, 34 (60%, see Table 18) have a membership domain covering all furniture sector activities. This is true for 34 of the 52 employer organisations (65%, see Table 28). Given that most of the companies in the sector are microfirms, Table 20 illustrates that most trade unions also organise and represent workers in microfirms (with fewer than 10 employees) and employees in companies with 10–19 employees. For the national employer organisations, Table 30 illustrates how national sectoral employer organisations develop activities specially oriented towards the interests of microfirms and SMEs.

In 22 of the 27 Member States, there is sectoral collective bargaining. For Estonia, Greece, Ireland, Luxembourg and Poland, this is not the case. For Bulgaria, Croatia, Czechia, Latvia, Malta and Romania, there is only company-level collective bargaining. In Poland, on-going negotiations at company level for IKEA were reported, though no agreement had been reached yet in 2023 when this study was finalised. Across the EU, given the overall small proportion of the workforce in the larger companies (which are more likely to be covered by collective bargaining), less than 25% of the sectoral workforce is covered by collective bargaining. For Romania, collective bargaining coverage is above 80%, but only SEB takes place. This is due to a statutory obligation in Romania for all companies with more than 20 employees, most of which have company-level trade unions, to engage in company-level collective bargaining. For the 15 Member States with sectoral collective bargaining not only at company level, MEB takes place at sector level. For Austria and Finland, there is only sectoral collective bargaining, while sectoral collective bargaining is combined with company-level bargaining in Belgium, Cyprus, Denmark, France, Germany, Hungary, Italy, Lithuania, the Netherlands, Portugal, Spain, Slovakia, Slovenia and Sweden. Bipartite or tripartite furniture sector social dialogue structures exist in the following 10 Member States: Belgium, Denmark, Finland, France, Germany, Italy, Latvia, the Netherlands, Romania and Slovakia.

Chapter 3 assessed the representativeness of the European social partners. On the side of the trade unions, the representative social partner is the **European Federation of Building and Woodworkers (EFBWW)**. On the side of the employer organisations, the representative social partners are the **European Furniture Industries Confederation (EFIC)** and the **European Furniture Manufacturers Federation (UEA)**.

Of the 57 sectoral trade unions, 38 are affiliated to the **EFBWW** (67%), in 24 Member States. In 21 Member States, the largest sectoral trade union is affiliated to the EFBWW. For Cyprus, Lithuania and Portugal, the EFBWW has an affiliated trade union but the one with the largest number of members in the sector is not affiliated. The EFBWW does not have an affiliated sectoral trade union for Greece, Slovakia or Slovenia. The workforces of these three Member States for which the EFBWW has no member trade unions correspond to 3.1% of the EU sectoral workforce.

Of the 49 trade unions involved in furniture sector collective bargaining, 32 are members of the EFBWW (67%), in 20 Member States. There are no EFBWW-affiliated trade unions involved in collective bargaining from Estonia, Greece, Ireland, Luxembourg, Poland, Slovakia or Slovenia. For Estonia, Greece, Ireland, Luxembourg and Poland, this is because there is no sectoral collective bargaining, while for Slovakia and Slovenia there is sectoral collective bargaining but no trade unions from those countries are affiliated to the EFBWW. Most of the trade unions affiliated to the EFBWW cover the entire furniture sector, and microfirms and SMEs are reported to be well organised by the EFBWW in most countries.

In Eurofound's 2016 representativeness study for the furniture sector, the EFBWW was found to have 39 affiliated sectoral trade unions, with 37 in what are now the 27 Member States, plus 2 in the United Kingdom. This is very similar to the 38 reported in this 2023 furniture sector representativeness study. Just like in this 2023 study, the EFBWW also did not have a sectoral member trade union for Greece, Slovakia or Slovenia in 2016.

The limits of the sectoral representativeness of the EFBWW have been analysed in four ways. First, Section 3.2 provided the results of the analyses of the 19 sectoral trade unions (from 12 Member

States) that are not affiliated to the EFBWW and therefore not represented in the furniture ESSDC. All except the Bulgarian and Greek ones are involved in collective bargaining. For seven Member States, the largest sectoral trade unions are not affiliated to the EFBWW. This is the case for Oikodomoi-PEO from Cyprus, SSSH from Croatia, O.O.S.E.E. from Greece, LBMAJDPS from Lithuania, Fevicom from Portugal, SLGS from Slovenia and OZ DLV from Slovakia. Second, answering the question of whether sectoral trade unions are also affiliated to other European trade union organisations revealed some multisectoralism. Sectoral trade unions' affiliations to other European associations are for their members in other sectors; for the furniture sector, the EFBWW appears to be the only European organisation representing furniture sector members or trade unions. Third, the negotiation capacity – the capacity to obtain a mandate from its members and to commit on their behalf – of the EFBWW was found to be well established and formalised. Fourth, and finally, the effective participation in the ESSDC meetings was limited to delegates from only 10 Member States in the 2021–2022 two-year period. There was no participating delegate from Romania, which has 7.1% of the EU sectoral workforce. Six other Member States each with more than 2% of the EU sectoral workforce – Austria, Bulgaria, Czechia, Lithuania, the Netherlands and Portugal – also did not have a participating trade union delegate.

It can therefore be concluded that the EFBWW is the **only representative** European organisation of furniture sector trade unions, and it has a proven full capacity to negotiate.

EFIC has 15 affiliated employer organisations/business associations from 14 EU Member States, most representing companies active in all sectoral activities. These 14 EU Member States together employ 58% of the sectoral workforce. For Denmark, EFIC has two affiliated sectoral employer organisations (DI and TMI); for the other 13 Member States, there is one affiliate each. The employer organisation with the strongest membership in the sector is represented by EFIC in 12 Member States (or 13 including Belgium, where it is not clear which is the largest in the sector). For Portugal and Spain, EFIC has an affiliated employer organisation but the largest sectoral employer organisations in these countries – APIMA in Portugal and FAMO in Spain – are not affiliated to EFIC.

In addition to the full members, EFIC also has 'clusters' that in recent years have become associated members. There are two such clusters in Italy, and one each in Denmark, Slovenia and Spain. None of these clusters is involved in collective bargaining. Adding these associated members to the full members results in a membership domain covering 16 Member States, as Slovenia and Spain have an associated cluster but no employer organisation as a full member.

In Luxembourg, there is no national sectoral employer organisation. For 10 other Member States, there is a sectoral employer organisation but no EFIC affiliate. This is the case for Croatia, Czechia, Estonia, Finland, Greece, Lithuania, Malta, Poland, Romania and Slovakia. For Spain and Slovenia EFIC does not have an affiliated employers organisation, but for those two Member States it has a cluster of companies affiliated, adding up to its membership domain. Two Member States with relatively large proportions of the EU sectoral workforce – Poland (21.9%) and Romania (7.1%) – do not have a sectoral employer organisation represented in EFIC. IKEA of Sweden is an associated member of EFIC. IKEA is also the largest sectoral employer in Poland, although it is not clear whether IKEA also represents IKEA Poland as an employer. There is also no organisation affiliated to EFIC in Lithuania, where 3.6% of the EU sectoral workforce is employed. All 15 affiliated organisations and the 5 associated clusters are represented only by EFIC on the ESSDC.

Twelve affiliated employer organisations, in 11 Member States, are involved in collective bargaining. EFIC only has the capacity to negotiate joint opinions, not binding agreements. It deals with the negotiation of such joint opinions on a case-by-case basis. There are no formalised mandating or decision-making procedures supporting EFIC's capacity to negotiate.

The **UEA** has three affiliated organisations from the following three Member States: Czechia, Portugal and Romania. These three Member States together employ 13% of the sectoral workforce: Romania, 7.1%; Portugal, 3.7%; Czechia, 2.3%. The UEA member organisation in each of these Member States is also the largest one in the sector. For Czechia and Romania, the only sectoral employer organisation is affiliated to the UEA; for Portugal, the largest one is affiliated. All three member organisations are represented only by the UEA on the ESSDC.

Of the three UEA-affiliated organisations, only APIMA from Portugal is involved in collective bargaining. The fact that the other member organisations are not involved in collective bargaining may mean that the UEA has a weak negotiation capacity at EU level.

There are 32 sectoral organisations (62%) from 15 Member States that are not represented by EFIC or the UEA on the ESSDC (see Section 3.6). Of them, 21 are involved in sectoral collective bargaining. This rather high proportion of national employer organisations not represented on the ESSDC could guide future capacity-building efforts in the sector. In terms of the EU sectoral workforce, it needs to be underlined that Poland – with 21.9% of the sectoral workforce – is not represented at all on the ESSDC.

Compared with the situation described in the 2016 furniture representativeness study, EFIC has increased its membership from 10 Member States in 2016 to 15 in this 2023 report. The additional five Member States where EFIC now has an affiliated organisation are Bulgaria, Cyprus, Ireland, Latvia and Spain. The membership of EFIC has thus been slightly strengthened.

In addition to the three Member States where the UEA still has member organisations (Czechia, Portugal, Romania), the UEA previously had member organisations in nine other Member States. For Bulgaria, Croatia, Cyprus, Estonia, Latvia, Lithuania, Malta, Poland and Spain, the UEA had an affiliated organisation in the 2016 report but no longer does. The membership of the UEA has thus been weakened, especially as a result of Poland (with 21.9% of the EU sectoral workforce), Lithuania (3.6%) and Bulgaria (2.5%) no longer being full members, and thus its representativeness has been reduced. This reduced representativeness also affects the UEA's capacity to participate effectively in the ESSDC. The UEA reports not having any capacity to negotiate. It reports having an ad hoc approach to handling its involvement in ESSDC joint opinions.

Section 3.7 listed several other European associations to which some national sectoral employer organisations are affiliated. CEI-Bois, the European employer organisation for the woodworking sector, appears here, as do subsectoral European associations from the woodworking sector, for example EOS, ETTF, FEP and Europanel, which are subsectoral member organisations that are part of CEI-Bois (see Table 79). There is also the European Builders Confederation (EBC), pointing to multisectoralism with the construction sector. However, the most important of the other European associations is FEMB, as its membership domain focuses on NACE 31.01 (production of office and shop furniture), which is part of the furniture sector. FEMB has affiliates in eight EU Member States, of which three are already represented by EFIC on the ESSDC. FEMB has a member organisation from Poland, where EFIC has no member organisation. For Poland, there are about 31,400 workers in office furniture production (17%

of the Polish sectoral workforce), which is, relatively speaking, rather significant in the sector, as Poland is the country with the largest sectoral workforce. FEMB also has a member organisation in Finland, where neither EFIC nor the UEA have a member organisation.

To conclude, EFIC and the UEA are not the only European sectoral employer associations to which sectoral employer organisations are affiliated. EFIC has stronger membership-based representativeness than the UEA, but the UEA has an affiliate from Romania, a Member State with a large proportion of the EU sectoral workforce. **Together they can thus be considered the most representative European employer organisations for the furniture sector.** However, there are factors that deserve attention in future capacity-building efforts, not least the non-representation of Poland, which has 21.9% of the EU sectoral workforce.

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Annex 1: Abbreviations and full names of organisations

Table 83: List of national trade unions for the furniture sector

| Member State | Acronym/name used in report | Name in English | Name in the original language |
|--------------|-----------------------------|--|--|
| AT | GBH | Construction and Woodworkers' Union | Gewerkschaft Bau-Holz |
| | GPA | Union of Private Sector Employees | Gewerkschaft der Privatangestellten, Druck, Journalismus, Papier |
| BE | ACLVB-CGSLB | General Federation | Algemene Centrale der Liberale Vakbonden van België |
| | ACV-CSC BIE | (General Christian Trade Union) Construction Industry and Energy | (Algemeen Christelijk Vakverbond) Bouw Industrie en Energie |
| | ABVV-FGTB ACCG | (General Belgian Trade Union) General Federation | (Algemeen Belgisch Vakverbond) Algemene Centrale – Centrale Générale |
| BG | BFTOFWPI/ФД | Bulgarian Federation of Trade Union Organisations in Forestry and Wood Processing Industries | Федерация на синдикалните организации от горското стопанство и дървопреработващата промишленост |
| | FLI Podkrepa/ФЛП Подкрепа | Federation of Light Industry Podkrepa | ФЛП на КТ "Подкрепа" |
| CY | Oikodomoi-PEO | Cyprus Building, Wood, Mine and General Workers Trade Union – PEO | Συντεχνία Οικοδόμων, Ξυλουργών, Μεταλλωρύχων και Γενικών Εργατών Κύπρου– ΠΕΟ |
| | Sebettyk-PEO/ΣΕΒΕΤΤΥΚ-ΠΕΟ | Cyprus Industry, Commerce and Press-Printing Houses and General Services Trade Union | Συντεχνία Εργατοϋπαλλήλων Βιομηχανίας, Εμπορίου, Τύπου-Τυπογραφείων και Γενικών Υπηρεσιών Κύπρου |
| | OOIM-SEK | Federation of Builders, Miners and Relevant Professions – SEK | |

| Member State | Acronym/name used in report | Name in English | Name in the original language |
|--------------|-----------------------------|--|---|
| | OBIEK-SEK | Cyprus Federation of Industrial Workers | Ομοσπονδία Βιομηχανικών Εργατοϋπαλλήλων Κύπρου |
| CZ | OS DLV | Trade Union of Workers in Woodworking Industry, Forestry and Management of Water | Odborový svaz pracovníků dřevozpracujících odvětví, lesního a vodního hospodářství v ČR |
| DE | IG Metall | Metalworkers Union | Industriegewerkschaft Metall |
| DK | CO-industri | Central Organisation of Industrial Employees | Centralorganisationen af Industriansatte i Danmark |
| | 3F | United Federation of Danish Workers | Fagligt Fælles Forbund |
| EE | EMTAÜ | Trade Union of Estonian Forest Industry Workers | Eesti Metsatöötajate Ametiühing |
| EL | O.O.S.E.E. | Greek Federation of Builders and Related Professions | Omospondia Oikodomon kai Synafon Epagelmaton Elladas |
| ES | UGT-FICA | General Workers' Union – Industry, Construction and Agriculture Federation | Unión General de Trabajadores – Federación de Industria, Construcción y Agro |
| | CCOO del Hábitat | CCOO of Hábitat | Comisiones Obreras del Hábitat |
| | ELA | Solidarity of Basque Workers Industry and Construction | Euskal Langileen Alkartasuna industria eta eraikuntza |
| FI | Teollisuusliitto | Finnish Industrial Union | Teollisuusliitto |
| | Pro | Trade Union Pro | Ammattiliitto Pro |
| FR | FNCB-CFDT | National Federation of Construction and Wood Workers | Fédération Nationale des Salariés de la Construction et du Bois – CFDT |
| | FG-FO | General Federation FO | Fédération Générale FO |

| Member State | Acronym/name used in report | Name in English | Name in the original language |
|--------------|-----------------------------|--|--|
| | FNSCBA-CGT | National Federation of Construction, Wood and Furniture Workers CGT | Fédération nationale des salariés de la construction, bois et ameublement CGT |
| | BA-TI-MAT CFTC | BA-TI-MAT Federation CFTC | Fédération BA-TI-MAT CFTC |
| | Fibopa CFE-CGC | CFE-CGC Wood and Paper Sector | Filière Bois Papier CFE-CGC |
| HR | SSSH | Autonomous Trade Union of Croatia | Savez Samostalnih Sindikata Hrvatske |
| | HRSINDSUM | Croatian Woodwork Trade Union | Hrvatski Sindikat Šumarstva |
| HU | ÉFÉDOSZSZ | Federation of Building, Wood and Material Workers' Unions | Építő, Fa, és Építőanyagipari Dolgozók Szakszervezeteinek Szövetsége |
| IE | SIPTU | Services Industry Professional Technical Union | |
| IT | Fillea-CGIL | Italian Federation of Wood, Construction and Related Industries' Workers | Federazione Italiana dei Lavoratori del Legno, dell'Edilizia, delle industrie Affini ed estrattive |
| | Filca-CISL | Italian Federation of Construction and Related Workers | Federazione Italiana Lavoratori delle Costruzioni e Affini |
| | Feneal-UIL | National Federation of Construction, Wood and Related Workers | Federazione nazionale lavoratori edili affini e del legno |
| LT | LBMAJDPS | Trade Union of Furniture and Woodworking Workers of Lithuania | Lietuvos baldų ir medžio apdirbimo įmonių darbuotojų profesinė sąjunga |
| | LMPF | Federation of Lithuanian Forest and Wood Worker Trade Unions | Lietuvos miško ir miško pramonės darbuotojų profesinių sąjungų federacija |

| Member State | Acronym/name used in report | Name in English | Name in the original language |
|--------------|-----------------------------|--|---|
| LU | OGB-L | Wood, Rubber, Ceramics, Chemicals, Cement, Paper, Plastic, Textiles and Glass Union of the OGB-L | Syndicat bois, caoutchouc, céramique, chimie, ciment, papier, plastique, textiles et verre de l'OGB-L |
| | LCGB-Indusid | LCGB Industry and Steel Industry | LCGB Industrie et sidérurgie |
| LV | LMNA | Forest Sphere Trade Union of Latvia | Latvijas Meža nozares arodbiedrība |
| MT | GWU | General Workers' Union | |
| NL | CNV Vakmensen | National Federation of Christian Trade Unions Professionals | Christelijk Nationaal Vakverbond Vakmensen |
| | FNV | Federation of Dutch Trade Unions | Federatie Nederlandse Vakbeweging |
| PL | SBiPD NSZZ Solidarnosc | Secretariat of Construction and Woodworking Industry of the NSZZ 'Solidarność' | Sekretariat Budownictwa i Przemysłu Drzewnego NSZZ 'Solidarność' |
| | ZZ Budowlani | Trade Union 'Budowlani' ('Builders') | Związek Zawodowy 'Budowlani' |
| PT | Setaccop | Construction, Public Works and Related Services Union | Sindicato da Construção, Obras Públicas e Serviços Afins |
| | Feviccom | Portuguese Federation of Construction, Ceramics and Glass Trade Unions | Federação Portuguesa dos Sindicatos da Construção, Cerâmica e Vidro |
| RO | FSLIL | Federation of Free Trade Unions in the Wood Industry | Federația Sindicatelor Libere din Industria Lemnului |
| | Sindicat MEX Suceava | MEX Suceava Trade Union (MEX is the | Sindicat MEX Suceava |

| Member State | Acronym/name used in report | Name in English | Name in the original language |
|--------------|-----------------------------|---|--|
| | | company part of the Mobexpert group) | |
| SE | GS | Swedish Union of Forestry, Wood and Graphical Workers | GS Facket för Skogs-Trä- and Grafisk Bransch |
| | Unionen | Unionen | |
| | Ledarna | Ledarna | |
| | SI | Swedish Association of Graduate Engineers | Sveriges Ingenjörer |
| SI | SLGS (Sinles) | Wood Processing Industry Trade Union of Slovenia | Sindikatesarstva in gozdarstva Slovenije |
| | Independence KNSS | Confederation of New Trade Unions of Slovenia | Neodvisnost KNSS |
| | Sinles Podgorje | Sinles – Podgorje company trade union | Sindikat Sinles podjetja Podgorje |
| | Alternativa Podgorje | Alternativa – Podgorje company trade union | Sindikat Alternativa podjetja Podgorje |
| SK | OZ DLV | Trade Union of Wood, Forestry and Water Management | Odborový zväz drevo, lesy, voda |

Table 84: List of national employer organisations for the furniture sector

| Member State | Acronym/name used in report | Name in English | Name in the original language |
|--------------|-----------------------------|---|---|
| AT | FVHI | Federal Association of the Austrian Wood Industry | Fachverband der Holzindustrie |
| | BITH | Federal Association of the Carpenters and Wood-Designing Crafts | Bundesinnung der Tischler und Holzgestalter |
| | BIMT | Federal Organisation of the | Bundesinnung der Maler und Tapezierer |

| Member State | Acronym/name used in report | Name in English | Name in the original language |
|--------------|--------------------------------|---|---|
| | | Painters and Upholsterers | |
| | FVTI | Federal Association of the Austrian Textile Industry | Fachverband der Textilindustrie |
| BE | Houtunie Houtbewerkers | Wood Union – Wood Workers | Belgische Houtconfederatie |
| | Fedustria | Belgian Federation of Companies in the Wood, Furniture and Textile Industry | Belgische Federatie van de ondernemingen van de hout-, meubel en textielindustrie |
| BG | БКДМП/BCWFI | Branch Chamber of Woodworking and Furniture Industry | Браншова Камара на дървообработващата и мебелната промишленост |
| | НАФИД/NAWPC | National Association of Wood Products Companies | Национална Асоциация на Фирмите за Изделия от Дърво |
| CY | Pasyvex | Cyprus Furniture & Woodworking Industry Association | |
| CZ | AČN | Association of Czech Furniture Manufacturers | Asociace českých nábykářů |
| DE | VDM | Association of German Furniture Industry | Verband der Deutschen Möbelindustrie |
| | IBA | Interior Business Association | Industrieverband Büro und Arbeitswelt |
| | Tischler Schreiner Deutschland | Federal Association for Crafts-Related Woodworking and Plastics Industries | Bundesverband Holz und Kunststoffindustrie |
| DK | TMI | The Wood and Furniture Industry Association | Træ- og Møbelindustrien |

| Member State | Acronym/name used in report | Name in English | Name in the original language |
|--------------|-----------------------------|--|--|
| | DI | Confederation of Danish Industry | Dansk Industri |
| EE | EMPL | Estonian Forest and Wood Industries Association | Eesti Metsa- ja Puidutööstuse Liit |
| | EMTL | Estonian Furniture Industry Association | Eesti Mööblitootjate Liit |
| EL | POVSKX | Pan-Hellenic Federation of Craft Woodworking Associations | Panellinia Omospondia Viotehnikon Somation Katergasias Xilou |
| ES | FAMO | Associated Office Furniture Manufacturers | Fabricantes Asociados de Mobiliario de Oficina |
| | UNEmadera | Spanish Business Association of Woodwork and Furniture | Unión Empresarial de la Madera y el Mueble de España |
| | AMBIT (previously Cenfim) | Cluster and Innovation Hub for Home and Contract Equipment | Cluster e innovationhub del equipamiento del hogar y el contract |
| | Fevama | Business Federation of Wood and Furniture of the Valencian Community | Federación Empresarial de la Madera y el Mueble de la Comunidad Valenciana |
| | Uniema | Córdoba Wood and Furniture Entrepreneurs Association | Asociación de Empresarios de la Madera y Mueble de Córdoba |
| | Asocama | Spanish Bedding Association | Asociación Española de la Cama |
| | AMC | Kitchen Furniture Association | Asociación de Mobiliario de Cocina |

| Member State | Acronym/name used in report | Name in English | Name in the original language |
|--------------|-----------------------------|---|--|
| FI | Metsäteollisuus | Finnish Forest Industries | Metsäteollisuus |
| | PTY | Association of Finnish Woodworking and Furniture Industry | Puuteollisuusyrittäjät |
| FR | UNIFA | French Furniture Industry Association | L'Ameublement français |
| | UNAMA | National Union of Furniture Crafts | Union national de l'Artisan des métiers de l'ameublement |
| HR | HUP UDPI | Croatian Employers' Association – Wood and Paper Industry Association | Hrvatska udruga poslodavaca, Udruga drvne i papirne industriju |
| | DK | Croatian Wood Cluster | Drvni klister |
| HU | Fabunio | Hungarian Wood and Furniture Union | Magyar Bútor és Faipari Szövetség |
| IE | IWFMN | Irish Wood and Furniture Manufacturing Network | |
| IT | FLA | Italian Federation of Wood, Cork, Furniture and Furnishing Industries | Federlegno Arredo |
| | Unital Confapi | Italian Union Wood Furniture | Unione Italiana Arredi Legno – Confederazione Italiana della Piccola e Media Impresa privata |
| | CNA Produzione | National Confederation of Crafts and Small and Medium Enterprises | Confederazione Nazionale dell'Artigianato e della Piccola e Media Impresa – Produzione |

| Member State | Acronym/name used in report | Name in English | Name in the original language |
|--------------|--|--|---|
| | Confartigianato Legno e Arredo | Confartigianato Wood and Furniture | Confartigianato Legno e Arredo |
| | Casartigiani | Autonomous Confederation of Crafts Unions | Confederazione Autonoma Sindacati Artigiani |
| | CLAAI | Confederation of Free Italian Craft Associations | Confederazione Libere Associazioni Artigiane Italiane |
| LT | LM | Association of Lithuanian Wood Industry Companies | Lietuvos medienos pramonės įmonių asociacija 'Lietuvos mediena' |
| LU | No employer organisation in the sector | | |
| LV | LKF | Latvian Forest Industry Federation | Latvijas Kokrūpniecības federācija |
| MT | CoC | Malta Chamber of Commerce | Il-Kamra tal-Kummerċ Maltija |
| | MEA | Malta Employers' Association | Malta Employers' Association |
| NL | CBM | Furniture Industry and Interior Construction Association | Branchevereniging voor Interieurbouw & Meubelindustrie |
| PL | OIGPM | Polish Chamber of Commerce of Furniture Manufacturers | Ogólnopolska Izba Gospodarcza Producentów Mebli |
| PT | AIMMP | Association of the Wood and Furniture Industries of Portugal | Associação das Indústrias de Madeira e Mobiliário de Portugal |
| | APIMA | Portuguese Association of Furniture and Related Industries | Associação Portuguesa das Indústrias de Mobiliário e Afins |

| Member State | Acronym/name used in report | Name in English | Name in the original language |
|---------------------|------------------------------------|--|--|
| RO | APMR | Romanian Furniture Manufacturers' Association | Asociația Producătorilor de Mobilă din România |
| SE | TMF | Swedish Federation of Wood and Furniture Industry | Trä- och Möbelföretagen |
| SI | ZDS | Association of Employers of Slovenia – Wood and Paper Section | Združenje delodajalcev Slovenije-Sekcijaza les in papir |
| | GZS-ZLPI | Chamber of Commerce and Industry of Slovenia – Furniture and Wood Processing Association | Gospodarska zbornica Slovenije -Združenje lesne in pohištvene industrije |
| SK | ZSD SR | Association of Wood Processing Employers of the Slovak Republic | Zvaz spracovatelov dreva Slovenskej republiky |

Annex 2: Multisectoralism and overlapping membership domains with other sectors

The vast majority of trade unions (47 of the 57) in the furniture sector also represent workers in the woodworking sector (Table 85). Construction is another sector widely represented by trade unions in the furniture sector (25 of the 57 trade unions). In addition, 18 sectoral trade unions also represent employees in the textiles sector.

Table 85: Multisectoralism of all trade unions

| MS | Trade union | Affiliated to the EFBWW | Representation of companies from other sectors | | |
|------|------------------|-------------------------|--|---------------------|--|
| | | | Woodworking | Textiles | Others |
| EU27 | 57 TUs in 27 MSs | 38 TUs in 24 MSs | 47 TUs in 26 MSs | 18 TUs in 10 MSs | 46 TUs in 22 MSs |
| AT | GBH | | | | Construction |
| | GPA | | | | This is an intersectoral TU that represents all white-collar employees working in the private sector of the industry and journalists; it is focused on the graphical sector. |
| BE | ACLVB-CGSLB | | | | Construction, paper, packaging, energy, transport |
| | ACV-CSC BIE | | | | Construction, energy, some industrial sectors |
| | ABVV-FGTB ACCG | | | | Construction, energy |
| BG | BFTOFWPI | | | | Forestry, paper and cellulose |
| | FLIPodkrepa | | | | Manufacture of wood and of products of wood and cork, paper and cellulose, manufacture of glass and clay, manufacture of footwear |
| CY | Oikodomoi-PEO | | | | Construction, extractive industries, cement manufacture, brick manufacture, etc. |

Representativeness of the European social partner organisations: Furniture sector

| | | | | | |
|-----------|------------------|-----|--|--|--|
| | Sebettyk-PEO | | | | Chemicals, commerce, printing houses, etc. |
| | OOIM-SEK | | | | Construction, extractive industries, cement manufacture, brick manufacture, etc. |
| | OBIEK-SEK | | | | Chemicals, commerce, printing houses, etc. |
| CZ | OS DLV | | | | Production of musical instruments, paper-making industry, water supply, forestry and logging, production of hygienic equipment, vocational schools, etc. |
| DE | IG Metall | | | | Metal, electrical |
| DK | CO-industri | | | | Skilled and unskilled workers in the majority of the private and public industrial sectors; also metal, construction, energy, glass production, steel, chemicals, extractive industries and cement |
| | 3F | 182 | | | Covers skilled and unskilled workers in both the public sector and the private sector. The largest groups are industry, construction and transportation. |
| EE | EMTAÜ | | | | |
| EL | O.O.S.E.E. | | | | Construction |
| ES | UGT-FICA | | | | Construction, manufacturing and agriculture |
| | CCOO del Hábitat | | | | Construction, wood and furniture sectors, cleaning, private security, hairdressers, waste collection, etc. |
| | ELA | | | | Manufacturing, construction |
| FI | Teollisuusliitto | | | | Chemical industry, technology industry, manufacturing industry |
| | Pro | | | | Chemical industry, food and drink, construction, etc. |
| FR | FNCB-CFDT | | | | Construction |
| | FG-FO | | | | Construction, pulp and paper, ceramic, cement |
| | FNSCBA-CGT | | | | Construction, cement, architects, energy, painting |

¹⁸² 3F represents CO-industri in the EFBWW.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | |
|----|------------------------|--|--|--|---|
| | BA-TI-MAT CFTC | | | | Construction, water, ceramics, tiles and bricks, surveyors, architectural firms |
| | Fibopa CFE-CGC | | | | Construction |
| HR | SSSH | | | | Paper |
| | HRSINDSUM | | | | |
| HU | ÉFÉDOSZSZ | | | | |
| IE | SIPTU | | | | |
| IT | Fillea-CGIL | | | | Construction |
| | Filca-CISL | | | | Construction |
| | Feneal-UIL | | | | Construction |
| LT | LBMA DPS | | | | Extraction of peat |
| | LMPF | | | | Forestry |
| LU | OGB-L | | | | Wood, rubber, ceramics, chemicals, cement, paper, plastic and glass |
| | LCGB-Indusid | | | | |
| LV | LMNA | | | | |
| MT | GWU | | | | Metal and construction; professionals, finance and services; government and public entities; hospitality and food; chemicals and energy; technology, electronics and communication; maritime and aviation; disciplinary corps, security and law enforcement officials |
| NL | CNV Vakmensen | | | | It is a cross-sectoral TU and therefore represents workers in all sectors in the Netherlands |
| | FNV | | | | It is a cross-sectoral TU and therefore represents workers in all sectors in the Netherlands |
| PL | SBiPD NSZZ Solidarnosc | | | | Construction, manufacturing of building materials |
| | ZZ Budowlani | | | | Construction, cooperative housing, manufacturing of building materials, property management, municipal utilities, forestry, national parks |
| PT | Setaccop | | | | Cement, ceramics and ornamental rocks |
| | Feviccom | | | | Manufacturing in ceramics, cement and glass industries, construction, the wood industry and similar activities, extraction |

| | | | | | |
|----|----------------------|--|--|--|--|
| | | | | | and transformation of marble, granite and cork |
| RO | FSLIL | | | | Manufacture of paper and paper products, logging |
| | Sindicat MEX Suceava | | | | |
| SE | GS | | | | Graphical |
| | Unionen | | | | All private sectors |
| | Ledarna | | | | All management staff |
| | SI | | | | All engineers |
| SI | SLGS (Sinles) | | | | |
| | Independence KNSS | | | | |
| | Sinles Podgorje | | | | |
| | Alternativa Podgorje | | | | |
| SK | OZ DLV | | | | Papers, forestry and water management |

Notes: Orange and grey shading denote a positive response. MS, Member State; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 86: Multisectoralism of trade unions affiliated to the EFBWW

| MS | Trade union | Representation of companies from other sectors | | |
|------|--|--|-----------------|---|
| | | Woodworking | Textiles | Others |
| EU27 | 38 TUs in 24 MSs | 34 TUs in 22 MSs | 14 TUs in 8 MSs | 32 TUs in 19 MSs |
| AT | GBH | | | Construction |
| BE | ACLVB-CGSLB | | | Construction, paper, packaging, energy, transport |
| | ACV-CSC BIE | | | Construction, energy, some industrial sectors |
| | ABVV-FGTB ACCG | | | Construction, energy |
| BG | Bulgarian Federation of Trade Union Organisations in Forestry and Wood Processing Industries | | | Forestry, paper and cellulose |

Representativeness of the European social partner organisations: Furniture sector

| | | | | |
|-----------|------------------|--|--|--|
| CY | OOIM-SEK | | | Construction, extractive industries, cement manufacture, brick manufacture, etc. |
| CZ | OS DLV | | | Production of musical instruments, paper-making industry, water supply, forestry and logging, production of hygienic equipment, vocational schools, etc. |
| DE | IG Metall | | | Metal, electrical |
| DK | CO-industri | | | Skilled and unskilled workers in the majority of the private and public industrial sectors; also metal, construction, energy, glass production, steel, chemicals, extractive industries and cement |
| | 3F | | | Covers skilled and unskilled workers in both the public sector and the private sector. The largest groups are industry, construction and transportation. |
| EE | EMTAÜ | | | |
| ES | UGT-FICA | | | Construction, manufacturing and agriculture |
| | CCOO del Hábitat | | | Construction, wood and furniture sectors, cleaning, private security, hairdressers, waste collection, etc. |
| | ELA | | | Manufacturing, construction |
| FI | Teollisuusliitto | | | Chemical industry, technology industry, manufacturing industry |
| | Pro | | | Chemical industry, food and drink, construction and others |
| FR | FNCB-CFDT | | | Construction |
| | FG-FO | | | Construction, pulp and paper, ceramic, cement |
| | FNSCBA-CGT | | | Construction, cement, architects, energy, brushing |
| HR | HRSINDSUM | | | |
| HU | ÉFÉDOSZSZ | | | |
| IE | SIPTU | | | |
| IT | Fillea-CGIL | | | Construction |
| | Filca-CISL | | | Construction |
| | Feneal-UIL | | | Construction |
| LT | LMPF | | | Forestry |
| LU | OGB-L | | | Wood, rubber, ceramics, chemicals, cement, paper, plastic and glass |
| | LCGB-Indusid | | | |
| LV | LMNA | | | |
| MT | GWU | | | Metal and construction; professionals, finance and services; government and public entities; hospitality and food; chemicals and energy; technology, electronics and |

| | | | | |
|----|------------------------|--|--|--|
| | | | | communication; maritime and aviation; disciplinary corps, security and law enforcement officials |
| NL | CNV Vakmensen | | | It is a cross-sectoral trade union and therefore represents workers in all sectors in the Netherlands. |
| | FNV | | | It is a cross-sectoral trade union and therefore represents workers in all sectors in the Netherlands. |
| PL | SBiPD NSZZ Solidarnosc | | | Construction, manufacturing of building materials |
| | ZZ Budowlani | | | Construction, cooperative housing, manufacturing of building materials, property management, municipal utilities, forestry, national parks |
| PT | Setaccop | | | Cement, ceramics and ornamental rocks |
| RO | FSLIL | | | Manufacture of paper and paper products, logging |
| SE | GS | | | Graphical |
| | Unionen | | | All private sectors |

Notes: Grey shading denotes a positive response. MS, Member State; TU, trade union.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Almost all employer organisations in the furniture sector affiliated to EFIC (13 of the 16) also represent companies in the woodworking sector (Table 87). Five of these organisations also represent companies in the textiles sector.

Table 87: Multisectoralism of employer organisations/business associations affiliated to EFIC

| MS | Employer organisation/ business association | Affiliation | | Representation of companies from other sectors | | |
|------|--|--------------|-----------|--|------------|--|
| | | EFIC | UEA | Woodworking | Textiles | Others |
| EU27 | | 16 in 15 MSs | 1 in 1 MS | 13 in 13 MSs | 5 in 5 MSs | 6 in 6 MSs |
| AT | FVHI | | | | | Production of skis |
| BE | Fedustria | | | | | |
| BG | Branch Chamber of Woodworking and Furniture Industry | | | | | Machinery, materials, consultancy and software |

| | | | | | | |
|----|-----------------------------|--|--|--|--|--|
| CY | Pasyvex | | | | | |
| DE | VDM | | | | | |
| DK | TMI | | | | | |
| | DI | | | | | Many others |
| ES | AMBIT ¹⁸³ | | | | | Bathroom equipment, lighting and electrical components, painting |
| FR | l'Ameublement français | | | | | |
| HU | Fabunio | | | | | Metals, commerce, IT, design |
| IE | IWFMN | | | | | |
| IT | FLA | | | | | |
| LV | LKF | | | | | |
| NL | CBM | | | | | Construction, metal industry |
| PT | AIMMP | | | | | |
| SE | TMF | | | | | |

Notes: Orange and blue shading denote a positive response. Organisations with names in bold are business associations. MS, Member State.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

All three of the employer organisations in the furniture sector affiliated to the UEA also represent companies in the woodworking sector (Table 88).

Table 88: Multisectoralism of employer organisations/business associations affiliated to the UEA

| MS | Employer organisation/ business association | Affiliation | | Representation of companies from other sectors | | |
|------|--|-------------|------------|--|-----------|------------|
| | | EFIC | UEA | Woodworking | Textiles | Others |
| EU27 | | 0 | 3 in 3 MSs | 1 in 1 MS | 1 in 1 MS | 3 in 3 MSs |

¹⁸³ Previously called Cenfim. In 2023, Cenfim changed its name to AMBIT.

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | |
|-----------|-------|--|--|--|--|--|
| CZ | AČN | | | | | Metals |
| PT | APIMA | | | | | Lighting, cutlery, decoration and objects of use for the home |
| RO | APMR | | | | | Prefabricated and semi-fabricated furniture, auxiliary materials and accessories for the furniture industry, interior design and planning, equipment manufacturers and furniture sellers, universities and professional training institutions ¹⁸⁴ |

Notes: Orange and blue shading denote a positive response. MS, Member State.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

¹⁸⁴ Prefabricated and semi-fabricated furniture, auxiliary materials and accessories for the furniture industry: 20 companies. Interior design and planning: 20 companies. Equipment manufacturers and furniture sellers: 70 companies. Universities and professional training institutions/entities: about 70 institutions.

Table 89: Multisectoralism of employer organisations/business associations not affiliated to EFIC or the UEA

| MS | Employer organisation/ business association | Representation of companies from other sectors | | |
|------|--|--|------------|---|
| | | Woodworking | Textiles | Others |
| EU27 | 33 in 16 MSs | 24 in 14 MSs | 9 in 6 MSs | 11 in 7 MSs |
| AT | BITH | | | |
| | BIMT | | | Painting, upholstery |
| | FVTI | | | Shoes, clothes, leather |
| BE | Houtunie Houtbewerkers | | | |
| BG | National Association of Wood Products Companies | | | Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials |
| DE | IBA | | | |
| | Tischler Schreiner Deutschland | | | |
| EE | EMPL | | | |
| | EMTL | | | |
| EL | POVSKX | | | Construction |
| ES | FAMO | | | |
| | UNEmadera | | | |
| | Fevama | | | |
| | Uniema | | | |
| | Asocama | | | |
| | AMC | | | |
| FI | Metsäteollisuus | | | Forestry |

Representativeness of the European social partner organisations: Furniture sector

| | | | | |
|-----------|--------------------------------|--|--|--|
| | PTY | | | |
| FR | UNAMA | | | |
| HR | HUP UDPI | | | |
| | DK | | | |
| IT | Unital Confapi | | | |
| | CNA Produzione | | | Metals, chemicals, glass, shipbuilding |
| | Confartigianato Legno e Arredo | | | |
| | Casartigiani | | | Many others |
| | CLAAI | | | All crafts |
| LT | LM | | | Paper industry, education |
| MT | CoC | | | Many others ¹⁸⁵ |
| | MEA | | | Many others ¹⁸⁶ |
| PL | OIGPM¹⁸⁷ | | | |
| SI | ZDS | | | |
| | GZS-ZLPI | | | |
| SK | ZSD SR | | | |

Notes: Blue shading denotes a positive response. Organisations with names in bold are business associations. MS, Member State.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

¹⁸⁵ Importers, distributors and retailers: healthcare business section, professional community lead pharmacists business section, wines, spirits, beverages and tobacco business section. Manufacturers and other economic activities: electrical and electronics business section, food and beverage processors business section, medical cannabis business section, plastics and rubber manufacturers. Service providers economic group: care home operators business section, employment agencies business section, financial services business section, information and communications technology business section, logistics business section, shipping and bunkering, tourism business section, virtual financial assets agents, yachting services business section.

¹⁸⁶ Manufacturing, education, wholesale, retail and other commercial services sector; aviation, maritime and transport; health and professional services; hospitality, tourism and travel; banking; insurance and financial services; information and communications technology and gaming; parastatal and government authorities; construction, electrical, engineering and metal.

¹⁸⁷ OIGPM used to be an associate member of the UEA. This is no longer the case.

Annex 3: Collective bargaining landscape in the furniture sector in the EU Member States

Table 90: The two most important MEB agreements in the furniture sector

| MS | Name of the CB agreement | Type of agreement | Date of signing and start of validity of the agreement | Trade union that signed the agreement | Employer organisation that signed the agreement | Share of all workers covered by the agreement |
|----|--|-------------------|--|--|--|---|
| AT | CB for blue-collar workers in the wood-processing industry | MEB | Signed 1 May 2021 Renewed after one year (if not, the old collective agreement does not expire) | GBH | FVHI | 20–30% |
| | CB for white-collar workers in the wood-processing industry | MEB | Signed 1 May 2021 Renewed after one year (if not, the old collective agreement does not expire) | GPA | FVHI | 10–15% |
| BE | No. 153887/CO/126 from 11 September 2019 | MEB | Signed in 2019 Valid from 2020 | ACLVB-CGSLB, ACV-CSC BIE, ABVV-FGTB ACCG, BBTK-SETCa | Houtunie Houtbewerkers, Fedustria | All blue-collar workers |
| | Collective agreement of 21 June 2017 on wages and working conditions | MEB | Signed in 2017 Valid from 2019 | ACLVB-CGSLB, ACV-CSC BIE, ABVV-FGTB ACCG, BBTK-SETCa | Houtunie Houtbewerkers, Fedustria | All blue-collar workers |
| BG | Collective agreement at company Sredna Gora | SEB | Confidential data | BFTOFWPI | Branch Chamber of Woodworking and Furniture Industry | About 1% |
| CY | Collective agreement between Pasyvex and Oikodomoi-PEO and OOIM-SEK regarding the working conditions of the furniture and woodworking industry | MEB | Signed in 2019 Valid from 2020 (automatic annual renewal) | Oikodomoi-PEO, OOIM-SEK | Pasyvex | Approximately 35% |
| | Collective agreement between the company A Stroman Ltd and the Cyprus Federation of Industrial Workers SEK of | SEB | Signed in 2018 Valid from 2019 (automatic annual renewal) | OBIEK-SEK, Sebettyk-PEO | A Stroman Ltd | Approximately 2% |

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | |
|----|--|-------------------------|-----------------------------------|---|---|--|
| | Nicosia-Kyrenia and the Cyprus Industry, Commerce and Press-Printing Houses and General Services Trade Union – PEO which regulates the working conditions of the staff of said company | | | | | |
| CZ | Kolektivní smlouva TON 2017–2021 (Collective agreement for 2017 to 2021 in TON company) | SEB | Signed in 2017 Valid from 2021 | The basic organisation of the Trade Union of Workers in the Woodworking Industry, Forestry and Management of Water Supplies | Management of the company TON a.s. and company TON-Energo a.s. | 3% |
| | Kolektivní smlouva 2019–2020 ve firmě Jitona (Collective agreement for 2017 to 2021 in Jitona company) | SEB | Signed in 2019 Valid from 2020 | The basic organisation of the Trade Union of Workers in the Woodworking Industry, Forestry and Management of Water Supplies | Management of the company Jitona a.s. | 1% |
| DE | Collective Wage Agreement Wood and Plastics Westfalia-Lippe | MEB | Signed in 2020 Valid from 2021 | IG Metall | Verband der Holz- und Kunststoffverarbeitenden Industrie Westfalia-Lippe (VDM member) | 50% directly covered, 95% indirectly covered |
| | Collective Wage Agreement Wood and Plastics | MEB | Signed in 2020 Valid from 2021 | IG Metall | Tischler Schreiner Deutschland | n.d. |
| DK | Collective Agreement for Woodworking and Furniture Industries | MEB | Signed in 2020 Valid from 2023 | 3F | DI | 50% (woodworking and furniture) |
| | Collective Agreement for Salaried Employees in Industry | MSB | Signed in 2020 Valid from 2023 | CO-industri | DI | Perhaps 30–40% |
| EE | | | | | | |
| EL | | | | | | |
| ES | Convenio colectivo de la Madera, Carpintería, Muebles y Afines de la Comunitat Valenciana | MEB at regional level | Signed in 2019 Valid from 2021 | CCOO del Hábitat, UGT-FICA | Fevama | 85–90% in the region of Valencia |
| | Convenio Colectivo del Sector de la Madera y el Mueble de Córdoba | MEB at provincial level | Signed in 2020 Valid from 2021 | CCOO del Hábitat, UGT-FICA | Uniema | 85–90% in the province of Córdoba |

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | |
|----|---|-----|---|---|---|------------------------|
| FI | Puusepänteollisuuden työehtosopimus | MSB | Signed in 2020 Valid from 2022 | Teollisuusliitto | Association of Finnish Furniture and Joinery Industries (part of Metsäteollisuus) Federation of Finnish Woodworking Industries | Probably around 50–70% |
| | Puusepänteollisuuden toimihenkilöiden työehtosopimus | MSB | Signed in 2020 Valid from 2022 | Pro | Association of Finnish Furniture and Joinery Industries (part of Metsäteollisuus) Federation of Finnish Woodworking Industries | Probably around 15% |
| FR | National collective agreement for the manufacture of furniture of 14 January 1986 | MEB | Signed in 1986 Indefinite validity | FG-FO, Fibopa CFE-CGC, BA-TI-MAT CFTC, FNCB-CFDT | UNAMA, l'Ameublement français, UIPP | 100% |
| | Agreement on the establishment of the works council (CSE) and the means made available to the IRP at Schmidt Groupe | SEB | Signed in 2018 Valid from 2022 | FNCB-CFDT, Fibopa CFE-CGC, FNSCBA-CGT | Schmidt Groupe | About 4.6% |
| HR | TVIN drvena industrija Virovitica | SEB | Signed in 2021 Valid from 2025 | SSSH | Management of the company | 2.5% |
| | Spačva | SEB | Signed in 2017 Valid from 2021 | SSSH | Management of the company | 2% |
| HU | Collective Agreement for the Wood and Furniture Professions | MEB | Signed 28 March 2002 Open-ended | Fa- és Bútoripari Dolgozók Szakszervezete (member of ÉFÉDOSZSZ) | Fabunio | 8% |
| | Collective agreement of the furniture factory Sitform | SEB | Signed 27 February 2004 Open-ended, updated every two to three years | Fa- és Bútoripari Dolgozók Szakszervezete (member of ÉFÉDOSZSZ) | Sitform Bútorgyár | 2% |
| IE | | | | | | |

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | |
|----|--|---------|--|--|--------------------------------------|---|
| IT | CCNL aziende operanti nei settori legno, sughero, mobile, arredamento e boschivi e forestali – FederlegnoArredo | MEB | Signed 20 October 2020 Valid from 31 December 2022 | Feneal-UIL, Filca-CISL, Fillea-CGIL | FederlegnoArredo | Around 150,000 workers in the wood and furniture sectors |
| | CCNL per i lavoratori della piccola e media industria del legno, del sughero, del mobile e dell'arredamento, e per le industrie boschive e forestali | MEB | Signed 31 May 2021 Valid from 28 February 2023 | Feneal-UIL, Filca-CISL, Fillea-CGIL | Unital Confapi | Around 16,000 workers in the wood and furniture sectors |
| LT | Sectoral collective agreement of manufacture of furniture sector | MEB | Signed 15 March 2019 Valid until signing of new agreement | LBMA DPS | LM | n.d. |
| | Collective agreement of AB Vilniaus baldai | SEB | Signed 2 December 2019 Valid from 2 December 2022 | Trade union of AB Vilniaus baldai (affiliated to LBMA DPS) | Administration of AB Vilniaus baldai | 3% |
| LU | | | | | | |
| LV | Troja | SEB | In force | LMNA | None | 163 employees of the company |
| MT | Joinwell-GWU | SEB | Signed 14 September 2017 Valid from 31 July 2021 | GWU | None | 2.2% |
| NL | CAO Meubelindustrie en Meubileringsbedrijven | MEB | Signed in 2020 Valid from 2021 | FNV, CNV Vakmensen | CBM | 60% |
| PL | | | | | | |
| PT | CCT AIMMP-Setaccop 2012 | MEB | Signed in 2012 Open-ended | Setaccop | AIMMP | Approximately 50% |
| | CCT AIMMP-Feviccom 2007–2008 | MEB | Signed in 2007 and 2008 Open-ended | Feviccom, Fepces, Fesaht, Fectrans, Fiequimetal, SQTD | AIMMP, APIMA, AIM, AIMC | Approximately 50% |
| RO | MEX | SEB | Signed in 2020 Valid from 2022 | Sindicat MEX Suceava | Sindicat MEX Suceava | 0.16% |
| SE | Tjänstemannaavtalet | MEB | Signed in 2020 Valid from 2023 | Unionen | TMF | Probably more than 90% of white-collar private sector workers |
| SI | Collective Agreement for the Wood Industry (Official Gazette of the RS, No. 58/2017) | MSB/CSB | Signed in 2017 Indefinite duration | SLGS (Sinles), Independence KNSS | ZDS, GZS-ZLPI | 70% (for companies that are members of employer organisation ZDS or GZS-ZLPI) |

Representativeness of the European social partner organisations: Furniture sector

| | | | | | | |
|----|--|-----|---|---|--------------------|-----------|
| | Collective agreement for company Podgorje | SEB | Signed in 1996 Indefinite duration | Sinles Podgorje, Alternativa Podgorje | Company Podgorje | 4% |
| SK | Kolektívna zmluva vyssieho stupna pre odvetvie drevospracujuceho priemyslu na r. 2020 uzatvorena medzi OZ DLV a ZSD SR | MEB | Signed in 2019 Valid from 31 December 2020 | OZ DLV | ZSD SR | About 5% |
| | Kolektívna zmluva Decodom Topolčany | SEB | Date of signing is not available Valid from 2020 | Local/basic organisation of OZ DLV at company level | Company management | About 10% |

Notes: *If there is no MEB, the most significant SEB agreement is presented. CB, collective bargaining; CSB, cross-sectoral bargaining; MSB, multisectoral bargaining; n.d., no data.*

Source: *Network of Eurofound Correspondents' national contributions to this study*

Most of the agreements in the furniture sector in the EU27 are concluded at sector level. In five countries (Greece, Estonia, Ireland, Luxembourg and Poland), national correspondents could not identify any collective bargaining in the furniture sector. It is possible that there might be agreements at company level, but the correspondents do not have information about these. In six other countries (Bulgaria, Croatia, Czechia, Latvia, Malta and Romania), there are no multi-employer sector-level collective bargaining agreements. Around 75% of the most important MEB agreements cover all parts of the furniture sector and all types of companies. There is also good coverage of all types of workers, with most agreements covering at least blue- and white-collar workers. Only in two cases (Austria and Sweden) do these agreements refer exclusively to white-collar workers or white-collar workers and management staff.

Annex 4: Other European organisations with some representativeness in the sector

Table 91: Representativeness of trade unions not affiliated to the EFBWW

| Member State | Trade unions not affiliated to the EFBWW that have some representativeness in the sector | Other European trade union associations with representativeness in the sector |
|--------------|--|---|
| AT | GPA ¹⁸⁸ | IndustriALL, UNI Europa, EFFAT, EPSU, ETF, EFJ |
| BE | n.d. | None |
| BG | Federation of Light Industry Podkrepa ¹⁸⁹ | IndustriALL |
| CY | Oikodomoi-PEO, Sebettyk-PEO, OBIEK-SEK | IndustriALL |
| CZ | n.a. | None |
| DE | n.a. | None |
| DK | n.d. | None |
| EE | n.a. | None |
| EL | O.O.S.E.E. | European part of UITBB/WFTU |
| ES | n.d. | ELA Manufacturing and Construction ¹⁹⁰ |
| FI | n.a. | None |
| FR | BA-TI-MAT CFTC, Fibopa CFE-CGC ¹⁹¹ | CEC European Managers |
| HR | SSSH | None |
| HU | n.a. | None |
| IE | n.d. | None |
| IT | n.a. | None |
| LT | LBMA DPS ¹⁹² | None |
| LU | n.d. | None |

¹⁸⁸ GPA organises and represents all white-collar employees in the private sector in Austria. It represents around 35% of sectoral employees.

¹⁸⁹ The Federation of Light Industry Podkrepa covers SMEs in NACE 31.01 and 31.09.

¹⁹⁰ ELA Manufacturing and Construction is representative only at regional level (Basque Country).

¹⁹¹ Covers fewer than 15% of sectoral workforce

¹⁹² Approximately 1,150 members – 4% of sectoral employees.

| | | |
|-----------|--|--------------------------------|
| LV | n.a. | None |
| MT | n.a. | None |
| NL | n.a. | None |
| PL | n.a. | None |
| PT | Fevicom ¹⁹³ | None |
| RO | MEX Suceava | None |
| SE | Ledarna (management staff) and Sveriges Ingenjörer (engineers) | IndustriALL, UNI Europa, Feani |
| SI | SLGS (Sinles), Independence KNSS, Sinles Podgorje, Alternativa Podgorje ¹⁹⁴ | None |
| SK | OZ DLV | None |

Notes: *n.a.*, not applicable; *n.d.*, no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 92: Representativeness of employer organisations in the furniture sector based on size, sector coverage and affiliation at European level

| | | |
|---|------|---|
| Countries where the largest employer organisation is affiliated to EFIC/UEA | EFIC | AT (FVHI), BG (Branch Chamber of Woodworking and Furniture Industry), CY (Pasyvex), DE (VDM), DK (TMI, DI ¹⁹⁵), FR (l'Ameublement français), HU (Fabunio), IE (IWFMN), IT (FLA), LV (LKF), NL (CBM), SE (TMF) |
| | UEA | CZ (AČN), PL (OIGPM), ¹⁹⁶ PT (APIMA), RO (APMR) |
| Countries where the second largest employer organisation is affiliated to EFIC/UEA | EFIC | BE (Fedustria), DK (TMI, DI ¹⁹⁷), ES (AMBIT), PT (AIMMP) |
| | UEA | |
| Countries with the most representative employer organisations in NACE 31.01 affiliated to EFIC/UEA/FEMB | EFIC | AT, BG, CY, DE, DK, FR, HU, IE, IT, LV, NL, SE |
| | UEA | CZ, PT, RO |
| | FEMB | DE, ES, FR, IT, SE |
| Countries with the most representative employer organisations in NACE 31.02 affiliated to EFIC/UEA/FEMB | EFIC | AT, BG, CY, DE, DK, FR, HU, IE, IT, LV, NL, SE |
| | UEA | CZ, ES, PT, RO |
| | FEMB | DE, FR, IT, SE |
| Countries with the most representative employer organisations in NACE 31.03 affiliated to EFIC/UEA/FEMB | EFIC | BG, CY, DE, DK, FR, IE, IT, LV, NL, SE |
| | UEA | CZ, PT, RO |
| | FEMB | DE, FR, IT, SE |

¹⁹³ Fevicom signs MEB agreements that cover approximately 50% of the sectoral workforce.

¹⁹⁴ Both SLGS (Sinles) and Independence KNSS are representative trade unions, representing at least 20% and 30% of workers in the sector, respectively.

¹⁹⁵ TMI is the largest standalone association, but it is under DI. TMI is affiliated to EFIC, and DI is thus indirectly affiliated.

¹⁹⁶ OIGPM in Poland used to be an associate member of the UEA.

¹⁹⁷ TMI and DI are interlinked, as mentioned previously.

| | | |
|---|------|--|
| Countries with the most representative employer organisations in NACE 31.09 affiliated to EFIC/UEA/FEMB | EFIC | AT, BG, CY, DE, DK, FR, HU, IE, IT, LV, NL, SE |
| | UEA | CZ, ¹⁹⁸ ES, PT, RO |
| | FEMB | DE, ES, FR, IT, SE |

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

Table 93: Representativeness of employer organisations which are not affiliated to EFIC, UEA, FEMB for the furniture sector

| Member State | Sectoral national EOs that have some representativeness in the furniture sector but are not affiliated to the three main European organisations (EFIC, UEA, FEMB) | Affiliates of EFIC and the UEA cover all types of employers in the sector (and all types of activities) | Sectoral national EOs affiliated to other European associations |
|--------------|---|---|---|
| AT | FVTI, BITH, BIMT | No ¹⁹⁹ | FVTI (Euratex) |
| BE | Houtunie Houtbewerkers | Yes | Houtunie Houtbewerkers (EBC) |
| BG | - | Yes | n.a. |
| CY | Cyprus Union of Furniture Makers and Carpenters | No ²⁰⁰ | n.a. |
| CZ | - | Yes ²⁰¹ | n.a. |
| DE | Tischler Schreiner Deutschland | No ²⁰² | n.a. |
| DK | - | Yes | TMI (CEI-Bois, EOS, Fefpeb, EuroWindor) |
| EE | EMTL, EMPL | n.a. | EMPL (CEI-Bois) |
| EL | POVSKX | n.a. | n.a. |
| ES | UNEmadera | Yes | Asocama |
| FI | Metsäteollisuus, PTY | n.a. | Metsäteollisuus (CEI-Bois), company Framery (FEMB) |
| FR | UNAMA | Yes | n.a. |
| HR | n.d. | n.a. | Croatian Wood Cluster (CEI-Bois) |
| HU | - | No ²⁰³ | n.a. |

¹⁹⁸ Besides the garden furniture subsector.

¹⁹⁹ Smaller-scale companies (*Gewerbe*) that do not make use of industrial production processes are not covered by FVHI.

²⁰⁰ This employer organisation has no members among companies with at least 250 employees.

²⁰¹ All besides the garden furniture subsector.

²⁰² VDM does not include companies with 1–9 employees.

²⁰³ Fabunio does not cover NACE 31.03 or self-employed workers and management staff.

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| | | | |
|----|---|--------------------|--|
| IE | - | Yes | n.a. |
| IT | CLAAI, Casartigiani, Confartigianato Legno e Arredo, CNA Produzione, Unital Confapi | Yes | n.a. |
| LT | LM | n.a. | n.a. |
| LV | - | Yes | n.a. |
| MT | CoC, MEA | n.a. | CoC (Enterprise Europe Network), MEA (SGI Europe, IOE, Businessmed) |
| NL | - | Yes | n.a. |
| PL | - | Yes ²⁰⁴ | n.a. |
| PT | - | Yes | AIMMP (CEI-Bois) |
| RO | - | Yes | n.a. |
| SE | - | n.d. | n.d. |
| SI | GZS-ZLPI, ZDS | n.a. | GZS-ZLPI (CEI-Bois) |
| SK | ZSD SR | n.a. | ZSD SR (Eumabois) |

Notes: EO, employer organisation; n.a., not applicable; n.d., no data.

Source: Network of Eurofound Correspondents' national contributions to this study, 2021

²⁰⁴ OIGPM is an associate member of the UEA.

Annex 5: Texts agreed by the European sectoral social partners

Table 94: Joint opinions and other texts agreed by sectoral social partners at European level

| Date | Agreed texts (N = 15) | Signed by | | | |
|------------------|---|-----------|------|-----|----------|
| | | EFBWW | EFIC | UEA | CEI-Bois |
| 23 April 2021 | Declaration on healthy and safe workplaces | | | | |
| 6 July 2020 | European social partners joint statement on digital transformation in workplaces of the European furniture industry | | | | |
| 24 April 2020 | COVID-19: To fight the corona pandemic, the European woodworking and furniture industries propose measures to protect workers' health, support economic activity and the sector's recovery | | | | |
| 20 June 2019 | Joint letter (to the European Chemicals Agency) – TCEP, TCPD and TDCP chemicals in furniture | | | | |
| 24 May 2018 | Joint statement of the European social partners from the woodworking sector and the furniture sector (on occupational safety and health) | | | | |
| 9 December 2014 | A social label for the furniture industry? (memorandum of understanding) | | | | |
| 23 November 2012 | Joint position of UEA and EFBWW on the creation of a European Furniture Sector Skills Council | | | | |
| 22 November 2012 | Joint declaration – Nano in furniture | | | | |
| 22 November 2011 | Joint position of the European social dialogue for the furniture industry on the new community strategy on occupational safety and health | | | | |
| 25 November 2009 | Joint declaration of UEA and EFBWW on the emission of formaldehyde from panels used in the production of furniture | | | | |
| 18 November 2009 | Joint declaration of the European social partners of the furniture industry, EFIC, UEA and EFBWW calling on the European and national authorities to support the industry in its confrontation with the economic crisis | | | | |
| 19 December 2006 | Rules of procedure of the furniture ESSDC | | | | |
| 19 December 2006 | Joint declaration of UEA, EFIC and EFBWW on the extension of the social dialogue in the enlarged countries | | | | |

| | | | | | |
|-------------|---|----|---|----|---|
| 6 July 2002 | Joint declaration by the European social partners of the furniture sector on the enlargement at the occasion of their conference on the enlargement held in Budapest on 5-6 July 2002 | | | | |
| | | | | | |
| | | 14 | 9 | 12 | 2 |

Annex 6: Network of Eurofound Correspondents

Table 95: National correspondents who contributed to this study

| Country | Correspondent(s) | Organisation |
|---------|---------------------------------|---|
| AT | Bernadette Allinger | Working Life Research Centre (FORBA) |
| BE | Dries Van Herreweghe | HIVA – Research Institute for Work and Society, KU Leuven |
| BG | Rositsa Makelova | Institute of Social and Trade Union Research (ISTUR) |
| CZ | Soňa Veverková | Research Institute for Labour and Social Affairs |
| DE | Sandra Vogel | German Economic Institute |
| | Birgit Kraemer | Institute of Economic and Social Research, Hans Böckler Foundation |
| | Thilo Janssen | |
| DK | Maria Hansen | Employment Relations Research Centre (FAOS), University of Copenhagen |
| | Frida Lilli Schlanbusch Nørkjær | |
| EE | Ingel Kadarik | Praxis Centre for Policy Studies |
| EL | Penny Georgiadou | Labour Institute of the General Confederation of Greek Workers (INE GSEE) |
| ES | Oscar Molina | Institute for Labour Studies, Universitat Autònoma de Barcelona |
| FI | Amanda Kinnunen | Oxford Research AB |
| FR | Frédéric Turlan | IR Share |
| HR | Predrag Bejakovic | Institute of Public Finance (IPF) |
| | Irena Klemencic | |
| HU | Nóra Krokovay | Kopint-Tárki Institute for Economic Research |
| IE | Andy Predergast | IRN Publishing |
| IT | Lisa Dorigatti | Department of Social and Political Sciences, University of Milan |
| LT | Inga Blaziene | Lithuanian Social Research Centre |
| LU | Franz Clément | Luxembourg Institute of Socio-Economic Research (LISER) |
| LV | Krišs Karnītis | EPC Ltd |
| NL | Koen Maas | Panteia BV |
| | Thomas de Winter | |

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| | | |
|----|---|---|
| PL | Maciej Pańków | Foundation Institute of Public Affairs |
| PT | Reinhard Naumann | Friedrich-Ebert-Stiftung (Lisbon) |
| RO | Cristina Boboc Simona Ghita Valentina Vasile Alexandra Deliu | European Institute of Romania |
| SE | Nils Brandsma | Oxford Research AB |
| SI | Barbara Lužar | Faculty of Social Sciences, University of Ljubljana |
| SK | Ludovit Cziria | Institute for Labour and Family Research |

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

The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the field of industrial relations in the EU Member States. This study identifies the European Federation of Building and Woodworkers (EFBWW) – representing employees – and the European Furniture Industries Confederation (EFIC) and the European Furniture Manufacturers Federation (UEA) – representing employers – as the only representative European-level social partner organisations in the furniture sector.

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

