

Industrial relations and social dialogue

# **Representativeness of the European social partner organisations: Tanning and leather sector**





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## Country codes

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



## Introduction

The aim of this representativeness study is to identify the relevant national and supranational social actors (i.e. trade unions and employer organisations) in the tanning and leather sector, and to show the association of national actors with the sector's European interest organisations for both workers and employers.

The impetus for this study, and for similar studies in other sectors, arises from the aim of the European Commission to identify the representative social partner organisations that are to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU) and that are eligible to participate in European sectoral social dialogue committees (ESSDCs).

The report is divided into five parts: an introduction; a first chapter, giving an overview of the economic specificities and employment trends in the tanning and leather sector; a second chapter, providing an analysis of the social partner organisations in the 23 EU Member States in which tanning and leather activities are recorded (EU-23); a third chapter, analysing the representativeness of the relevant European organisations, in particular their membership composition and capacity to negotiate; and a conclusion. No significant tanning and leather-manufacturing activities were found to be conducted in Cyprus, Ireland, Luxembourg or Malta; therefore, these Member States are not covered in the report.

The following sections present the objectives of the study, along with a brief introduction to European social dialogue in the tanning and leather sector, and a brief introduction to the chosen methodology.

### 0.1. Objectives of the study

Representativeness studies are conducted for four reasons:

- the European Commission aims to confirm the representativeness of the social partner organisations consulted under Article 154 of the TFEU;
- representativeness is an eligibility criterion for setting up or participating in an ESSDC;
- representativeness also means having the capacity to negotiate agreements that can be implemented by Council decisions, as provided for by Article 155 of the TFEU;
- these studies can provide guidance for future capacity-building initiatives.

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

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

To accomplish its aims, this study first identifies the relevant national social partner organisations in the tanning and leather sector, before analysing the structure of the sector's relevant European organisations, in particular their membership compositions.

## 0.2. Historical background of the tanning and leather ESSDC

As mentioned in the previous representativeness study regarding the tanning and leather sector, published in 2017, the ESSDC for the tanning and leather industry was established in 1999 in response to a joint request from the European Trade Union Federation of Textiles, Clothing and Leather, now known as the industriAll European Trade Union (industriAll Europe), and the Confederation of National Associations of Tanners and Dressers of the European Community (COTANCE).

Since the establishment of the ESSDC, industriAll Europe and COTANCE have produced a number of joint texts in the context of social dialogue (Table 1).

Table 1: Joint texts of the European social partners participating in the tanning and leather ESSDC

Date	Topic of the joint opinion or agreement
4 June 2024	TCLF social partners' priorities for the next European mandate (2024–2029)
9 July 2020	Joint declaration on the economic impact of COVID-19 on the textile, clothing, leather and footwear industries
15 December 2015	Manifesto of the social partners of the leather industry at EU level
9 December 2014	Leather industry's social partners' joint letter to Commission President Mr Juncker
24 February 2014	Joint declaration on the defence of the European leather industry
29 May 2012	Joint statement on the ban of Cr VI in leather and leather products
29 May 2012	Joint statement on the free trade agreement between the EU and Ukraine
15 December 2009	Joint statement of the social partners of the European leather industry on the Greenpeace report on the deforestation of the Amazon rain forest
16 January 2006	Joint declaration of the social partners of the European leather Industry on EU origin marking scheme – Proposal for a Council regulation on the indication of the country of origin of certain products imported from third countries
16 January 2006	Joint declaration of the social partners of the European leather industry on the EU origin marking scheme
14 October 2005	Joint declaration of the social partners of the European leather industry
6 June 2005	Joint declaration of the social partners on Mr Gazzoni's statement about tanneries (in <i>Corriere della Sera</i> , 8 March 2005, p. 27)
13 September 2004	Procedural rules of the sectoral dialogue committee in the leather/tanning sector
24 March 2004	EU spring summit: Contribution of the social partners of the European leather industry
1 January 2003	Working document for the social partners on the social dialogue in the EU tanning sector
10 July 2000	Code of conduct in the leather and tanning sector
30 May 2000	Programme d'action sociale: contribution des partenaires sociaux du secteur de la chaussure (lettre) [Social action programme: Contribution of the social partners in the tanning and leather sector (letter)] (available in French only)
23 May 2000	Contribution of the social partners in the leather industry to the preparation of the new social policy agenda
29 February 2000	Lisbon summit: Contribution of the social partners of the European leather industry
17 January 2000	Joint declaration by the social partners in the tanning sector concerning, among other things, training requirements in the context of modernising the organisation of work, improving the image of the sector and putting in place the observatory on industrial change

Source: European Commission, undated.

### 0.3. Definitions and methodology

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

#### Sector-relatedness

Sector-relatedness refers to the demarcation of the tanning and leather sector in agreement with the social partners and the European Commission. Analyses of the ways in which trade unions and employer organisations relate to the sector must consider the extent to which their membership domains cover all types of workers in all types of companies performing all types of activities in the sector. Determining how the sector is defined is crucial for assessing sector-relatedness.

Every sector is demarcated in terms of general industrial classification of economic activities within the European Union (NACE) (Rev. 2) codes. All existing sectoral social dialogue committees have been assigned a NACE code, which defines the scope of economic activities they cover. The NACE code to be applied in each sectoral representativeness study is confirmed by the European Commission in consultation with the social partners.

This study defines the tanning and leather sector in relation to NACE 15.11 (NACE Rev. 2), which includes the following activities:

- tanning, dyeing and dressing of hides and skins;
- manufacture of chamois-dressed, parchment-dressed, patent or metallised leather;
- manufacture of composition leather;
- scraping, shearing, plucking, currying, tanning, bleaching and dyeing of fur, skins and hides with hair on.

The study focuses on European and national organisations.

**European organisations** are analysed using a top-down approach if they are on the European Commission's list of interest organisations to be consulted on behalf of the sector under Article 154 of the TFEU, and/or if they participate in sector-related European social dialogue.

A **national organisation** is considered to be a relevant sector-related interest association if it meets both of the following criteria:

- the association's field of activity relates to the sector;
- the association is either affiliated to a European-level organisation, that is analysed in the study using the top-down approach (regardless of its involvement in collective bargaining or regularly involved in sector-related collective bargaining).

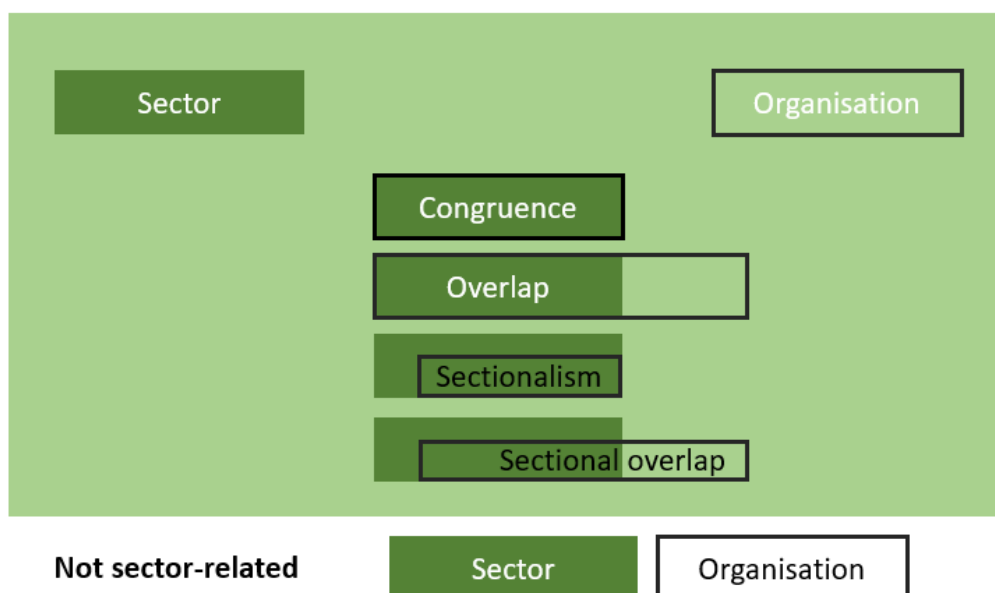
Table 2 and Figure 1 show the membership domain patterns that can exist. The membership domains of trade unions and employer organisations can be exactly in line with the demarcation of the sector (i.e. covering all activities in NACE 15.11); this type of sector-relatedness is called 'congruence'. If the membership domain of an organisation goes beyond the tanning and leather sector as defined in this study, it is categorised as 'overlapping'. 'Sectionalism' is a type of sector-relatedness whereby an organisation covers part of the sector and no other sectors, whereas organisations that fall into the 'sectional overlap' category cover part of the sector and also have members in other sectors.

Table 2: Membership domain patterns of organisations

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

Source: Eurofound.

Figure 1: Four different types of sector-relatedness



Source: Eurofound.

## Membership

Membership is another important aspect of representativeness. This study looks at two levels of membership: first, the geographical coverage of EU-level organisations (e.g. how many Member States an EU-level trade union or employer organisation has affiliates in); and, second, the organisational density (i.e. the number of members who are employees as a percentage of the total number of employees in a given industry or Member State) of the national affiliates. Important aspects to be assessed are whether the EU-level players organise most, or at least the most significant, national-level players (significant in relation to their membership strength in the sector and their involvement in collective bargaining), and whether there are any major gaps in their membership domains.

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

### Organisational capacity

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

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

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

Finally, organisations' representativeness depends on their structures and resources, their capacity to encourage the active participation of their members and consider the different interests of member organisations, and their potential to act autonomously at the EU level. Organisations' effective participation in the tanning and leather ESSDC is assessed in terms of their presence at committee meetings in 2022, 2023 and 2024.

## 0.4. Data collection and quality control measures

### Data collection

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

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

Except where otherwise stated, this study draws on the country-level data provided by the Network of Eurofound Correspondents (with contributors named in the Annex). Where precise data were not available, estimates were used. Therefore, quantitative data (e.g. those used to calculate density rates) may stem from any of the following sources:

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

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

The information used in this study was collected by the Network of Eurofound Correspondents from a series of 24 national contributions. The national correspondents are required to gather data on all relevant national-level organisations using standardised questionnaires, approaching them by telephone or email. While the questionnaires are in English, correspondents can interview or contact the organisation in the relevant national language. The questionnaires are completed by the national correspondents.

## Quality assurance

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

Between February and April 2024, combining the top-down and bottom-up approaches, information on the affiliates of the relevant EU-level social partners and on other sector-related associations was collected from the reports prepared by the Network of Eurofound Correspondents. The information was subsequently checked by the authors of the report. Where necessary, the national correspondents were asked to revise the national reports. Based on the data collected, an overview report was drafted by the authors between August and November 2024.

An initial informal (pre-evaluation) consultation between the Directorate-General for Employment, Social Affairs and Inclusion and the European-level sectoral social partners identified in the report was carried out between January and April 2025. Based on the comments received during the consultation, the draft report was finalised and submitted for formal written evaluation by Eurofound's Advisory Committee on Industrial Relations, the European-level sectoral social partners identified in the report and the Directorate-General for Employment, Social Affairs and Inclusion between April and May 2025. Following this evaluation, final corrections were made, and the report was edited and then published on Eurofound's website.

During this process, all relevant actors and organisations mentioned in the report were invited to check the consistency of the information included in it, thereby ensuring that the bottom-up approach included all the relevant sector-related organisations from each Member State. As different social partner organisations were able to view the information reported by other organisations in the same

country and, if necessary, comment on the credibility or accuracy of the information on other organisations representing a similar membership, this process involved an element of mutual control and recognition.

These quality assurance measures, and the evaluation and approval of the report by Eurofound's Advisory Committee on Industrial Relations – which consists of representatives of employer organisations and trade unions, governments and the European Commission – and the European-level sectoral social partners identified in the report, ensure the legitimacy of the findings of this study.



## 1. Background and employment specificities in the sector

The tanning and leather industry, as defined using the NACE (Rev. 2) classification system (NACE 15.11), is a relatively small and shrinking industrial sector in the EU. It covers business activities spanning the tanning, dyeing and dressing of hides and skins; the manufacture of chamois-dressed, parchment-dressed, patent or metallised leathers; the manufacture of composition leather; and the scraping, shearing, plucking, currying, tanning, bleaching and dyeing of fur, skins and hides with hair on. The destinations of the production outputs of the European tanning and leather industry are primarily high-end and medium-to-high-end segments of the footwear, leather goods, automotive and furniture industries (COTANCE and industriAll Europe, 2020).

The tanning and leather industry in the EU is composed of nearly 2 850 companies employing around 40 000 workers <sup>(1)</sup> (Eurostat's 2022 structural business statistics (SBS)) (see Table 3). The aggregated EU annual turnover for 2022 was around EUR 8.9 billion <sup>(2)</sup> (Eurostat's 2022 SBS).

One feature of this industry is its uneven spread across the EU: whereas some Member States have almost no activity at all in the tanning and leather sector (Cyprus, Ireland, Luxembourg and Malta), production is significantly concentrated in one country, Italy. The 2022 annual turnover of tanning and leather production in Italy amounted to EUR 6.6 million (Eurostat's 2022 SBS), which is nearly three quarters of the total sectoral turnover in the EU. In Italy, the sector employs around 21 800 workers (Eurostat's 2022 SBS), accounting for more than half of the total sectoral workforce in the EU.

Beyond Italy, the tanning and leather sector represents a relatively important business activity in a group of Member States where sectoral employment ranges from 1 500 to 3 000 people, namely Germany, Poland, Portugal and Spain (see Table 3). In most countries, however, employment figures in the sector are very small, with several countries employing around 150–1 500 workers in the sector. This is the case in Austria, Croatia, Czechia, France, Greece, the Netherlands, Romania, Slovakia, Slovenia and Sweden. In Belgium, Bulgaria, Denmark, Estonia, Finland, Hungary, Latvia and Lithuania, the national tanning and leather industry employs fewer than 150 workers.

Family-owned small and medium-sized enterprises traditionally dominate the European productive landscape in the tanning and leather industry, yet larger companies and multinationals are not absent from the sector (COTANCE and industriAll Europe, 2020). Variation in prevalent company size primarily depends on national specificities in the industry, especially due to the diverse outlets of sectoral production: whereas tanning and leather outputs in southern European countries such as Italy, Portugal and Spain is traditionally connected to the fashion industry and the small firm size matches the flexibility required by that sector, in central and eastern Europe, they are mainly destined for the

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<sup>(1)</sup> Figures on employment in the tanning and leather industry vary slightly between reporting institutions, probably due to discrepancies in national statistical classifications, especially regarding self-employed workers. Specifically, while Eurostat's structural business statistics (SBS) counted around 37 500 workers across the EU in 2022, based on our calculation, which combines data from the SBS and national sources, there were around 40 000 workers. Significant discrepancies between national data and the SBS were found particularly in Croatia, where the SBS registered 152 people as employed in the sector in 2022, but national data indicated a workforce of close to 3 500 workers.

<sup>(2)</sup> For Bulgaria, Estonia and Spain, the SBS estimates of net turnover from 2021 are used, as data for 2022 were missing (data were extracted on 4 October 2024). The total estimate does not include Denmark and Slovenia, as data are missing for these Member States for both years.

upholstery sector, and the automotive industry in particular, with larger businesses catering for these requirements (COTANCE and industriAll Europe, 2020). Despite general stability in national patterns of production, interesting changes are ongoing in countries such as France, where large luxury fashion groups (e.g. Hermès, Chanel) are pursuing a policy of vertically integrating tanneries and finishing plants to secure the quality of their supplies, to the detriment of traditional family-owned small businesses (Network of Eurofound Correspondents – French national correspondent).

Changes in the European tanning and leather industry are also the result of broader trends in the global economy. Since turnover peaked in 2001, topping 11 billion (COTANCE and industriAll Europe, 2012), the sector has been shrinking, primarily due to global competition. Following the lifting of protective tariffs on products of the tanning industry in the second half of the 1990s, European tanners have been increasingly affected by competition with cheaper suppliers from developing countries (COTANCE and industriAll Europe, 2020). Different market and labour regulations across continents and countries, including the higher environmental and social standards in the EU, have made it more difficult for European tanners to compete on an equal footing with producers in countries with more liberal regulatory regimes.

Moreover, other factors – such as the spread of animal diseases like bovine spongiform encephalopathy, which has resulted in a spike in the price of raw materials; and the unfavourable global economic environment resulting from the 2007–2008 financial crisis – have posed further challenges to the industry.

The COVID-19 pandemic, and the related temporary stop to most productive activities, placed additional pressure on tanners in the EU. In this regard, the case of Denmark is telling. In 2020, the Danish government ordered the culling of 17 million minks in response to the detection of a variant of COVID-19 among the animals. As mink breeding and fur production are the main business activities in the country within the tanning and leather sector, for about three years nearly all sector-related activities were halted, de facto annihilating the whole industry (Network of Eurofound Correspondents – Danish national correspondent).

The European tanning industry has responded to these challenges by specialising in high-quality production and innovation and identifying the high-end manufacturing segment as the main outlet for its products (COTANCE and industriAll Europe, 2020). Conquering this market niche has allowed European tanning companies to thrive in the global market as leaders in terms of both quality and value, making the EU's share of global turnover the largest (reaching 30 %), ahead of Brazil, China, India and other countries (COTANCE and industriAll Europe, 2020).

Technological innovation is another feature of the European tanning industry. For instance, high-tech machinery can facilitate the correct disposal of industrial waste resulting from the tanning process, supporting companies to meet the environmental standards prescribed in EU legislation (COTANCE and industriAll Europe, 2020). Yet innovation is costly and requires constant investment. This can pose a challenge for small and medium-sized enterprises, especially in countries where the sector is small and companies are not sufficiently integrated into stable value chains.

Recently, other trends have placed additional demands on the industry, including demands from some consumers to limit or halt the use of animal products. Following changes in consumption and a broader shift towards more sustainable practices, European companies have made efforts to foster the sustainability of the industry – for example, through the project 'Green Deal leather' – while also

highlighting the nature of tanneries as key players in the circular economy, due to their use of hides and skins that are by-products of the meat and dairy industry. The project was run by COTANCE and industriAll, with the participation of national members of COTANCE in Austria, France, Germany, Hungary, Italy, Portugal and Spain).

**Table 3: Overview of the sector in terms of number of companies, employment, self-employment and turnover, 2022**

Member State	Companies	Total employment	Self-employment (%)	Turnover (million EUR)
<b>EU-27</b>	2 847 <sup>(3)</sup>	~ 40 000 <sup>(4)</sup>	6	8 927.3
<b>AT</b>	30	1 398	2.2	175.1
<b>BE</b>	13	135	7.4	18.5
<b>BG</b>	22	90	12.2	4.6 (*)
<b>CZ</b>	98	211	30.8	14.0
<b>DE</b>	83	2 622	0.4	412.8
<b>DK</b>	4	4	0	n.d. <sup>(5)</sup>
<b>EE</b>	7	69 (*)	2.9 (*)	3.6 (*)
<b>EL</b>	72	535	13.8	40.9
<b>ES</b>	230 (*)	2 887 (*)	3.5 (*)	498.7 (*)
<b>FI</b>	34	126	8.7	15.7
<b>FR</b>	85	611	6.7	119.9
<b>HR</b>	7	152	10.3	23.1
<b>HU</b>	20	42	28.5	2.4
<b>IT</b>	1 619	21 801	7.7	6 598.3
<b>LT</b>	8	65	7.7	1.8
<b>LV</b>	9	10	40	0.1
<b>NL</b>	39	485	2.3	151.7
<b>PL</b>	145	2 780	4.1	422.5
<b>PT</b>	91	1 974	1.4	274.6
<b>RO</b>	72	353	12.4	28.6
<b>SE</b>	29	256	0	60.9

<sup>(3)</sup> Estimates of the companies active in NACE 15.11 in the EU-27 are based on data from Eurostat's 2022 SBS (extracted on 4 October 2024) and data provided by the Network of Eurofound Correspondents.

<sup>(4)</sup> Estimates of total employment in NACE 15.11 in the EU-27 are based on data from Eurostat's 2022 SBS (extracted on 4 October 2024) and data provided by the Network of Eurofound Correspondents.

<sup>(5)</sup> Data on the annual turnover for Denmark are not available.

<b>SI</b>	8	272 (**)	1.8 (**)	n.d. <sup>(6)</sup>
<b>SK</b>	64	1 078	4.5	59.6

(\*) Data from Eurostat's SBS for 2021 (latest year with data available), extracted on 4 October 2024.

(\*\*) Data from the Network of Eurofound Correspondents.

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

*Source:* Eurostat's 2022 SBS.

## 1.1. Employment in the tanning and leather sector

The figures for total employment in the tanning and leather sector in the EU portray a picture of stability since 2014, with some 40 000 people employed in the industry. Yet the general picture hides a different reality when looking at trends at the national level: employment in the industry has been consistently declining in many Member States; the few outliers in eastern and south-eastern Europe, where the sectoral workforce has greatly expanded, counterbalance the decline elsewhere.

Tables 3 and 4 provide an overview of the change in the numbers of companies and people employed between 2014 and 2022. The tables confirm a largely declining trend in employment and the number of companies in many Member States, with increases in employment in others. However, gaps and inconsistencies in the data concerning changes in the industry landscape in national contexts (often due to changes in data collection categories) make it difficult to develop a clear picture of the link between employment and the business landscape in the sector in several countries.

The general picture shows a major downsizing of the tanning and leather sector in terms of employment in many Member States, including those with higher shares of employment in the sector, such as Portugal (– 55.4 %) and Spain (– 10.4 %). Employment also fell substantially in other Member States, where the industry's size was already limited. This is the case for Austria (– 40.8 %), Belgium (– 54.4 %), Bulgaria (– 30.8 %), Denmark (– 91.5 %), Estonia (– 51.4 %), Finland (– 12.5 %), Latvia (– 76.8 %) and Lithuania (– 71.5 %). The decline was more limited in the largest productive country in the industry (Italy), at 3.2 % of the total workforce in the sector.

In contrast, the data available show a significant increase in employment in Slovakia (115.6 %), Poland (30 %) and the Netherlands (10.5 %). In Slovenia, the change in total employment is more limited but also on the rise (2.6 %). A slight increase in sectoral employment was also reported in Sweden (2.0 %).

The trend in some eastern and south-eastern Member States may be explained by companies from central and western Europe moving their activities to neighbouring Member States, to benefit from lower taxation and labour costs.

<sup>(6)</sup> Data on the annual turnover for Slovenia are not available.

Table 4: Change in employment in the sector, 2014–2022

Member State	Total employment, 2014 <sup>(7)</sup>	Total employment, 2022	Change in employment (%)
<b>EU-27</b>	40 000	~ 40 000 <sup>(8)</sup>	0
<b>AT</b>	2 362	1 398	– 40.8
<b>BE</b>	296	135	– 54.4
<b>BG</b>	130	90	– 30.8
<b>CZ</b>	n.d.	211	n.d.
<b>DE</b>	n.d.	2 622	n.d.
<b>DK</b>	47	4	– 91.5
<b>EE</b>	142	69 (*)	– 51.4
<b>EL</b>	n.d.	535	n.d.
<b>ES</b>	3 222	2 887 (*)	– 10.4
<b>FI</b>	144	126	– 12.5
<b>FR</b>	n.d.	611	n.d.
<b>HR</b>	151	152	0
<b>HU</b>	n.d.	42	n.d.
<b>IT</b>	22 511	21 801	– 3.2
<b>LT</b>	228	65	– 71.5
<b>LV</b>	43	10	– 76.8
<b>NL</b>	439	485	+ 10.5
<b>PL</b>	2 136	2 780	+ 30
<b>PT</b>	4 365	1 947	– 55.4
<b>RO</b>	n.d.	353	n.d.
<b>SE</b>	251	256	+ 2.0
<b>SI</b>	265	272 (**)	+ 2.6
<b>SK</b>	500	1 078	+ 115.6

(\*) Data from Eurostat's SBS for 2021 (latest year with data available).

(\*\*) Data from the Network of Eurofound Correspondents.

Note: n.d. = no data.

Source: Eurostat's 2022 SBS.

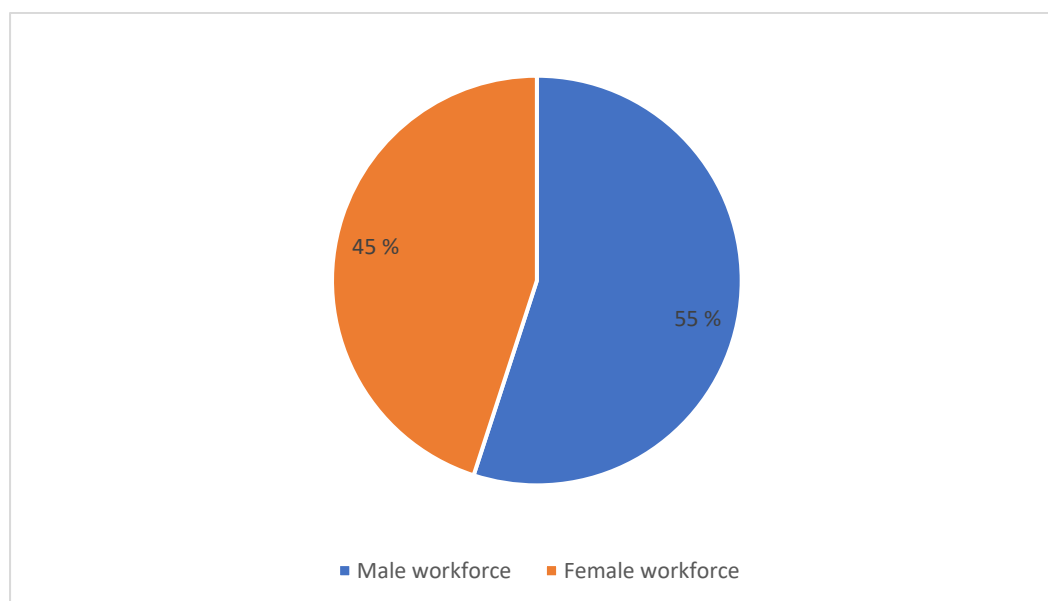
<sup>(7)</sup> Data from the previous representativeness study on the tanning and leather sector, gathered in 2016.

<sup>(8)</sup> Estimation based on data from Eurostat's 2022 SBS and data provided by the Network of Eurofound Correspondents.

## Workforce characteristics in the sector

In the Member States for which gendered data are available, there is a slightly greater prevalence of male workers than female workers (see Figure 2). However, in a group of countries (including Czechia, Denmark, Finland, Germany, Italy and Lithuania) the share is rather equal between women and men, while in Croatia and Slovenia women dominate the sector (accounting for 75 % and 80 % of employment, respectively) (see Table 5). The prevalent form of employment in the sector is full-time permanent employment, with only a limited share of temporary contracts (COTANCE and industriAll Europe, 2020).

Figure 2: Gender distribution of employment in the sector, EU average, 2022



*Note:* The EU average displayed in the figure was calculated based on only 13 of the 23 Member States included in this study, as no data on the gender distribution of employment in the sector were available for Belgium, Estonia, Greece, Hungary, Latvia, the Netherlands, Poland, Romania, Slovakia or Sweden.

*Source:* Network of Eurofound Correspondents, 2023.

Table 5: Gender distribution of employment in the sector, 2022 (%)

Member State	Male	Female
AT	~ 70	~ 30
BE	n.d.	n.d.
BG	74.4	25.6
CZ <sup>(9)</sup>	46	54
DE	55	45
DK	43	57
EE	n.d.	n.d.
EL	n.d.	n.d.
ES	82	18
FI	~ 55	~ 45
FR	66	34
HR	25	75
HU	n.d.	n.d.
IT	51	49
LT	55	45
LV	n.d.	n.d.
NL	n.d.	n.d.
PL	n.d.	n.d.
PT	~ 70	~ 30
RO	n.d.	n.d.
SE	n.d.	n.d.
SI	20	80
SK	n.d.	n.d.

Note: n.d. = no data.

Source: Network of Eurofound Correspondents, 2023.

Although the majority of the workforce is in dependent employment, self-employment exists in particular in artisanal tanning and leather activities. Self-employment is an important part of employment in the tanning and leather sector in Czechia (30.8 %), Hungary (28.5 %) and Latvia (40 %), based on data from Eurostat's 2022 SBS (see Table 3). Additionally, in some Member States – such as

<sup>(9)</sup> Figures for Czechia refer to the broader NACE 15.1 sector, as no disaggregated data for NACE 15.11 are available.

Bulgaria (12.2 %), Croatia (10.3 %), Greece (13.8 %) and Romania (12.4 %) – the share of the self-employed workforce in the sector accounts for more than 10 % of total employment in the industry.

A common trend in all countries is the ageing of the workforce. Data from COTANCE and industriAll Europe (2020) show that workers over 55 accounted for 16.6 % of the overall working population in 2020, constituting an increase of nearly 7 % compared with 2012. Combined with the 46–55 age group (accounting for 30.9 % of workers in 2020, with the prevalence remaining stable since 2012), they make up around 38 % of workers in the tanning and leather industry.

The scarcity of specific training for prospective workers in the leather sector, combined with a generalised lack of attractiveness of the industry, is among the main reasons for the ageing of the workforce (based on information from the Network of Eurofound Correspondents). Most of the sectoral workforce possesses secondary education, often obtained in vocational schools. However, given the small size of the industry, many countries no longer offer specific vocational pathways into the tanning and leather industry. Vocational schools usually provide broader curricula preparing learners to enter the leather, footwear or fashion industry. As a result, on-the-job training is the main source of education in the sector across Europe. However, in Member States where the sector plays a larger role in the national economy (e.g. France, Italy and Spain), sector-specific education is available, sometimes resulting from partnerships between local institutions and social partners. An example is the initiative of the Veneto region in Italy, which has started cooperating with UNIC (the association of Italian tanneries) to run a three-year vocational curriculum, with the primary objective of improving the sector's reputation. The curriculum also aims to increase the skills level of the workforce and draw in new talents, by integrating theoretical knowledge with practical skills in the tanning and leather industry (Network of Eurofound Correspondents – Italian national correspondent).

Although workers with a secondary education have remained the most prevalent group over the past decade, the segment of workers with tertiary education in the tanning and leather sector has nearly doubled (COTANCE and industriAll Europe, 2020). The growing demand for a high-skilled workforce in the sector reflects the technological and regulatory developments in the industry, in particular in relation to the increasing automation of production processes and the legal requirement to comply with more sophisticated environmental and waste management regulations.

The ageing of the workforce, combined with a generalised lack of sector-specific training programmes, has resulted in growing labour shortages, detected across most Member States. In some Member States, such as Austria and Croatia, the relatively low sectoral wages compared with other economic activities further exacerbate labour shortages. In the case of Austria, relatively low wages and challenging working conditions have resulted in a considerable increase in workers commuting from Hungary and Slovenia, especially among those manufacturers in the south-eastern parts of the country (Burgenland, Styria) (Network of Eurofound Correspondents – Austrian national correspondent).

The large share of small and medium-sized enterprises in the industry makes it more challenging for trade unions to organise the workforce. However, especially in countries where larger companies exist, unionisation levels in the industry are reported to be in line with those of the overall national economy (Network of Eurofound Correspondents).



### Artisanal activities in the sector

Industrial production is undoubtedly prevalent in the tanning and leather sector in the EU based on the share of employment. However, a very small niche of artisanal craftsmanship exists in European countries – except for in Latvia and the Netherlands, where no artisanal activities are reported. Tanning and leather artisans are mainly self-employed (Network of Eurofound Correspondents).

Artisanal activities in the tanning sector are usually linked to the continued use of traditional techniques that are no longer used in industrial tanning (Network of Eurofound Correspondents – Italian national correspondent). For instance, in Czechia, artisanal producers concentrate on the processing of hides in small quantities using the traditional technique of fish oil tanning (Network of Eurofound Correspondents – Czech national correspondent). More artisanal work is, however, concentrated in downstream activities connected to the manufacturing of leather goods, therefore pertaining to a different NACE code (15.12).

## 1.2. Companies in the tanning and leather sector

The number of companies active in the European tanning and leather sector has generally declined since the previous representativeness study, except in Finland, Romania, Slovakia and Sweden.

Table 6 illustrates the trends in the business landscape in the sector in Europe. However, in some Member States, changes are hard to estimate due to a lack of available data from 2014 or because of changes in data collection methods. In Germany, for example, the 2014 figures only included companies with 20 or more employees, while more recent statistical data also encompass smaller firms. In Estonia, the number of companies active in 2022 includes self-employed workers because the national statistical office considers these workers small businesses. However, this group was not included in the 2014 data, therefore hindering accurate comparison.

Table 6: Change in the number of companies in the sector, 2014–2022

Member State	Number of companies, 2014 <sup>(10)</sup>	Number of companies, 2022	Change (%)
<b>EU-27</b>	3 053	2 847 <sup>(11)</sup>	– 6.8
<b>AT</b>	30	30	0
<b>BE</b>	152	13	n.d.
<b>BG</b>	22	22	0
<b>CZ</b>	n.d.	98	n.d.
<b>DE</b>	14 <sup>(12)</sup>	83	n.d.
<b>DK</b>	7	4	– 42.9
<b>EE</b>	12	7	– 41.7
<b>EL</b>	n.d.	72	n.d.
<b>ES</b>	266	230 (*)	– 13.5
<b>FI</b>	28	34	+ 21.4
<b>FR</b>	140	85	– 39.3
<b>HR</b>	10	7	– 30
<b>HU</b>	34	20	– 41.2
<b>IT</b>	1 878	1 619	– 13.8
<b>LT</b>	11	8	– 27.3
<b>LV</b>	9	9	0
<b>NL</b>	42	39	– 7.1
<b>PL</b>	209	145	– 30.6
<b>PT</b>	100	91	– 9
<b>RO</b>	49	72	+ 46.9
<b>SE</b>	11	29	+ 163.6
<b>SI</b>	11	8	– 27.3
<b>SK</b>	18	64	+ 255.6

(\*) Data from Eurostat's SBS for 2021 (latest year with data available).

Note: n.d. = no data.

Source: Eurostat's 2022 SBS for NACE 15.1, including NACE 15.11 and NACE 15.12 (manufacture of luggage, handbags and the like, saddlery and harness).

<sup>(10)</sup> Data from the previous representativeness study on the tanning and leather sector, gathered in 2016.

<sup>(11)</sup> Estimation based on data from Eurostat's 2022 SBS and data provided by the Network of Eurofound Correspondents.

<sup>(12)</sup> Figure includes only companies with 20 or more employees.

Most companies in the sector are microenterprises (0–9 employees), followed by small enterprises (10–49 employees) (see Figure 3). Table 7 shows the number of active companies by size. Due to a lack of accurate data for the tanning and leather sector only, we rely on a level 3 breakdown of NACE 15.1, which encompasses both NACE 15.11 (tanning and dressing of leather, dressing and dyeing of fur) and NACE 15.12 (manufacture of luggage, handbags and the like, saddlery and harness). Table 47 provides more detail, reporting the total numbers of enterprises in NACE 15.1 for each Member State of interest in this study, along with the share of enterprises in NACE 15.11 (in brackets).

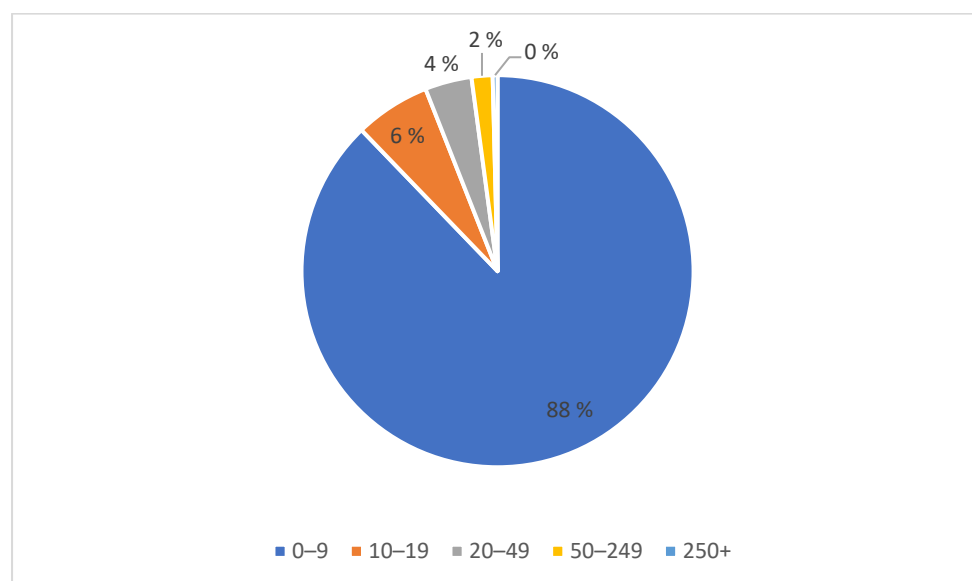
The prevalence of small and medium-sized enterprises makes the sector fragmented and not easy to organise in most countries. However, employer organisations do exist, especially in countries where the sector is large (e.g. France, Italy, Portugal, Spain), and in those whose industrial relations systems favour the organising of employers, as is the case in Austria, where membership of the sectoral employer organisation is compulsory.

**Table 7: Distribution of companies in the sector by size (NACE 15.1)**

Number of employees	0–9	10–19	20–49	50–249	250+
Number of companies	15 468	1 096	680	305	70

Source: Eurostat's 2022 SBS.

**Figure 3: Distribution of companies in the sector by size (NACE 15.1)**



Source: Eurostat's 2022 SBS.

### 1.3. Impact of the twin transitions on the tanning and leather sector

The tanning and leather industry in Europe has increasingly integrated digital technologies and automated machinery (usually referred to as Industry 4.0) in its production processes and industrial waste treatment operations (Network of Eurofound Correspondents; COTANCE and industriAll Europe, 2020). Beyond the traditional gains in efficiency and productivity of work processes, technologies have been introduced in the tanning sector to improve the environmental footprint of the industry. From this perspective, the European tanning and leather sector demonstrates how

technological innovation can support the ecological transition of a traditionally highly polluting industry and facilitate companies' compliance with the extensive EU and national legislation regulating the industry, for instance regarding the disposal of animal by-products not intended for human consumption (Regulation (EC) No 1069/2009 and Commission Regulation (EU) No 142/2011), and the management of chemicals and wastewater resulting from production processes. Today, in European leather production 90 % of chemicals and air and water pollutants emitted are recycled (Dispan and Mendler, 2021). In 2022, the industry social partners COTANCE and industriAll Europe launched the 'Green Deal leather' project, with the ambition of moving towards a European leather industry with zero adverse impact in the environment in the near future.

Innovation is, however, not homogeneous across the sector and Member States. Digital transformation requires high volumes of investment, which are not always available to micro- and small enterprises, especially in countries where the sector is less developed (e.g. Estonia, Latvia).

Environmental protection efforts can include investing in high-tech wastewater treatment plants, bioenergy production and the development of environmentally friendly processes. Throughout European countries, research and development projects are undertaken in cooperation with companies from the chemical industry or with research institutes all over Europe. An interesting example comes from the fur industry in Greece. There, as the Network of Eurofound Correspondents reported, the waste from the fur treatment process undergoes physiochemical cleaning, and the resulting mud, after any toxic substances have been removed, is used as fertiliser in fields, while the water run-off is channelled to biological cleaning facilities for final cleaning. In addition, leather is treated using organic and vegetable products such as acorns and animal fat. Innovation and new technologies therefore also facilitate the tanning industry's contribution to the circular economy. Other examples from EU tanning companies include the reuse of collagen from hides in the cosmetics industry (Denmark) and the use of waste from tanneries to produce biogas (Sweden). A number of countries, including Hungary, are placing increasing emphasis on leather repair as a contributor to circularity.

The progressive high-tech evolution of the industry has important implications for the future composition of the workforce and provision of training, as it requires an increasing number of high-skilled professions (including digital supply chain analysts, sustainability technicians, digital marketing professionals, process and production timeline analysts, and biochemistry and engineering professionals). In addition, among blue-collar workers, who still constitute the backbone of the sectoral workforce, the digital and green transitions are generating demands for new skills and knowledge required to understand and implement sustainable practices in production in areas such as waste management, and for compliance with environmental regulations.

## 2. National-level representation

Chapter 2 provides an overview of the 35 trade unions and 26 employer organisations active at the national level in the tanning and leather sector.

**Table 8: Number of sectoral organisations by Member State**

Number of trade unions							Member State	Number of employer organisations / business associations						
						2	AT	2						
						3	BE	1						
						0 (*)	BG	0 <sup>(13)</sup>						
						1 <sup>(14)</sup>	CZ	1 <sup>(15)</sup>						
						1	DE	2						
						2	DK <sup>(16)</sup>	0						
						0	EE	0						
						1	EL	1						
						2	ES	1						
						1	FI	1						
						5	FR	1						
						1	HR	1						
						1	HU	2 <sup>(17)</sup>						
						4	IT	2						
						0	LT	0						
						0	LV <sup>(18)</sup>	0						
						2	NL	1						
						0	PL	3						
						3	PT	1						
						1	RO	0						

<sup>(13)</sup> In Bulgaria, the employer organisation Bulfhhi, included in the previous representativeness study on the tanning and leather sector, has not been active since 2022. A newer employer organisation, BATOK, was founded in 2017 and represents companies in the larger textile, leather and footwear sector. BATOK has no companies active in the tanning sector, according to the information provided by its chair, and therefore is not included in this study.

<sup>(14)</sup> OS TOK does not have members in the tanning and leather sector. However, it is a signatory of a collective agreement that covers the textile, clothing and leather industry and therefore covers around 50 workers in the sector. The union is a member of industriAll and is therefore included despite not having members in the sector.

<sup>(15)</sup> For Czechia, ATOK is included as an employer organisation even though it has no members in the tanning and leather sector. This is because the employer organisation co-signed a bargaining agreement for a broad range of light industry sectors that has been extended to the tanning and leather sector and covers around 50 employees.

<sup>(16)</sup> With regard to Denmark, the employer organisation DI indicated to the Eurofound correspondent that it has no members in the tanning and leather sector (NACE 15.11). The company Scan-Hide, a COTANCE member, recorded activity in the sector in the past, but is currently active mainly in NACE 10.11 (slaughtering).

<sup>(17)</sup> For Hungary, we consider MKSZ and BCE sector-related employer organisations. We do so for BCE because it has one member company active in the sector, and for MKSZ because BCE is one of its members and, importantly, because it is affiliated to COTANCE.

<sup>(18)</sup> In Latvia, the employer organisation VRUA has members in the textile and clothing industry but not in the tanning and leather sector, and it does not engage in collective bargaining in the sector. Therefore, it is not included in the study.

						3	SE	3							
						1	SI	3							
						1	SK	0							
						35	EU-23	26							

(\*) In Bulgaria, trade unions linked to the tanning and leather sector were identified but they do not organise workers in the sector. There is an industriAll Europe affiliated trade union in Bulgaria, but its members are mainly in the textile sector. The union attends some meetings of the tanning and leather ESSDC but is not included here.

Source: Network of Eurofound Correspondents, 2023.

Table 8 shows the number of trade unions and employer organisations in each Member State, which is illustrated by the cells marked in green. No sectoral trade unions exist in 5 of the 23 Member States included in the study: Bulgaria, Estonia, Latvia, Lithuania and Poland. Nine Member States have one trade union active in the sector (Croatia, Czechia, Finland, Germany, Greece, Hungary, Romania, Slovakia and Slovenia), and another nine have two or more trade unions. With regard to employers, 7 of the 23 Member States have no employer organisations active in the tanning and leather sector (Bulgaria, Denmark, Estonia, Latvia, Lithuania, Romania and Slovakia). One employer organisation exists in 9 of the 23 Member States studied (Belgium, Croatia, Czechia, Greece, Finland, France, the Netherlands, Portugal and Spain), and 7 Member States have more than one such organisation (Austria, Germany, Hungary, Italy, Poland, Slovenia and Sweden).

The remainder of this chapter examines the 35 trade unions and 26 employer organisations active at the national level in the tanning and leather sector across three dimensions: sector-relatedness, membership strength, and position in their national industrial relations landscape and related capacity to influence the working conditions of workers in the industry. Sector-relatedness is the coverage of different parts of a sector, categories of workers and workers in companies of various sizes. Membership strength concerns, for trade unions, the number of affiliated workers; or, for employer organisations, the number of member companies, and therefore the workforce covered. The position of the social partners in the industrial relations landscape of the sector is assessed based on the participation of trade unions and employer organisations in collective bargaining (and the coverage thereof) and social dialogue at the national level.

## 2.1. Trade unions

Tables 9 and 10 should be read together to understand the sector-relatedness of the trade unions in the tanning and leather industry. Table 9 illustrates the extent to which the trade unions active in the 23 Member States in which the sector exists cover the different productive parts of the tanning and leather industry. The first row presents the subsectors into which economic activities in the tanning and leather sector can be divided. Some 12 trade unions (of the total of 35 in the sector) cover all parts of the industry.

Table 9 also shows whether the trade unions' coverage goes beyond tanning and leather activities. As shown in the table, all the trade unions analysed (35) have broader coverage than the productive activities of the tanning and leather sector. Therefore, all the national-level trade unions represent either cases of overlapping sector-relatedness (i.e. when the whole tanning and leather sector is

covered and the trade union also covers workers in other industries) or sectional overlap (i.e. when the trade union covers only some parts of the tanning and leather sector but also workers in other sectors).

Table 9: Overview of sector coverage of trade unions in the sector

	Total	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities	Other sectors covered	European affiliation
<b>Number of trade unions</b>	35	27	29	27	20	23	28	14	35	30 (industri All Europe) <sup>(19)</sup>
<b>Number of Member States</b>	17	14	15	13	9	10	14	5	17	17 (industri All Europe)
<b>Member States with no trade unions</b>	BG, EE, LT, LV, PL									

Source: Network of Eurofound Correspondents, 2023.

More detailed information by Member State is provided in the Annex (Table 48).

Table 10 illustrates the categories of workers that the 35 national-level unions active in the tanning and leather sector cover in terms of employment status, education level and company size. A majority of trade unions (31 in 17 Member States) organise employees in the industry. Twenty-one trade unions in 11 Member States represent management staff. In 12 Member States where trade unions are active in the sector, self-employed workers are not represented by any sectoral trade union. In terms of the education levels of the workforce organised by the trade unions included in the study, workers with secondary education are most widely covered by sectoral trade unions (29 organisations in all countries but Denmark). In four Member States (Denmark, Finland, Romania and Slovakia), workers with tertiary education are not organised by any trade unions. Concerning the representation of workers by company size, sectoral unions' coverage extends to micro- (29 trade unions), small (28 trade unions) and medium-sized enterprises (26 trade unions), which predominate in the industry. A lower degree of trade union representation of workers is observed for larger companies. This should be interpreted in light of the specificity of the sector, which is primarily

<sup>(19)</sup> Two unions are affiliated to other organisations: ACV-BIE is affiliated to industriAll and UNI Europa, and CFE-CGC AGRO is affiliated to EFFAT.



driven by companies of small (and micro) and medium size, with relatively few larger companies in Member States where the sector is more prominent (e.g. Italy). More detailed information by Member State can be found in the Annex (Table 49). Although some of the trade unions included in the study generally cover workers in companies with more than 250 employees, if no such companies exist in a country in this specific sector, the cell is left blank. This is the case, for instance, for the Swedish trade unions.

Table 10: Overview of categories of workers covered by sectoral trade unions

	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Education level			Company size (number of employees)			
						Primary	Secondary	Tertiary	0–9	10–49	50–249	250+
Number of trade unions	31	9	6	21	26	27	29	25	29	28	26	13
Number of Member States	17	5	2	11	14	15	16	13	13	13	14	8

Source: Network of Eurofound Correspondents, 2023.

Table 11: Organisational density of sectoral trade unions

Member State	Number of trade union members in the sector	Members for which data are available	Trade union members in the sector	Density (%)	Membership trend <sup>(20)</sup>
AT	2	1	278	17.9	Decreasing
BE	3	2	149 <sup>(21)</sup>	—	—
BG	0				Stable
CZ	0				
DE	1	1	1 500	64.9	— <sup>(22)</sup>

<sup>(20)</sup> Assessment of the membership trend applies to trade unions for which data were provided.

<sup>(21)</sup> A discrepancy emerges for Belgium between total employment and trade union membership, which makes estimates of density and trends hard to report. The discrepancy may be due to the different sources from which the figures were drawn, namely Eurostat's SBS for the figure of total employment and the trade unions for trade union membership.

<sup>(22)</sup> The membership trend is difficult to estimate due to contradictory evidence provided by the trade union to the national correspondent: while the trade union argues that its membership in the sector has been decreasing, the figures it provides for its membership seem to have doubled since the last representativeness study in the sector (based on data from 2016).

<b>DK</b>	2	2 <sup>(23)</sup>	10	— <sup>(24)</sup>	Stable
<b>EE</b>	0				
<b>EL</b>	1	0	n.d.	n.d.	Stable
<b>ES</b>	2	0	n.d.	n.d.	n.d.
<b>FI</b>	1	0	n.d.	n.d.	Decreasing
<b>FR</b>	5	5	150 <sup>(25)</sup>	8.7	Increasing
<b>HR</b>	1	1	75	2.1 <sup>(26)</sup>	Decreasing
<b>HU</b>	1	1	700–800 <sup>(27)</sup>	18.5	Increasing
<b>IT</b>	4	0	n.d.	n.d.	n.d.
<b>LT</b>	0				Decreasing
<b>LV</b>	0				
<b>NL</b>	2	1	Approximately 20	4.88	Decreasing
<b>PL</b>	0				
<b>PT</b>	3	2	550	28.2	Most representative trade union – decreasing
<b>RO</b>	1	0	n.d.	n.d.	n.d.
<b>SE</b>	3	2	177	66	Stable
<b>SI</b>	1	1	30	11	Stable <sup>(28)</sup>
<b>SK</b>	1	1	360	35.6	Stable

Note: n.d. = no data.

Source: Network of Eurofound Correspondents, 2023.

Table 11 illustrates the organisational density of trade unions in the tanning and leather sector and related trends in membership. The data on trade union members, membership density and trends are

<sup>(23)</sup> In Denmark, trade union membership is the same for 3F and CO-industri, as CO-industri is the trade union association, of which 3F is part, that engages in collective bargaining. Hence, although we consider both trade unions representative, we only consider their membership once to avoid overlap.

<sup>(24)</sup> Difficult to calculate due to differences between trade union membership reported by the unions and in national employment data.

<sup>(25)</sup> Trade union membership figures for France are estimates by the national correspondent based on average union density in the country, due to a lack of membership data from the representative trade unions in the sector. The figures should therefore be interpreted with caution.

<sup>(26)</sup> This is based on national data, which far exceed SBS data (based on SBS data, the figure would be 49 %).

<sup>(27)</sup> This figure refers to trade union members under both NACE 15.11 and NACE 15.12.

<sup>(28)</sup> The trade union maintains that membership in the sector is stable, yet the membership figures provided are higher than those in the previous sectoral representativeness study (2017).

reported in an aggregated (national) form, and not for each trade union (for an analysis of the membership of each industriAll Europe affiliate, please refer to Chapter 3).

The following methodological notes apply to the table. Trade union density was calculated using national employment data, which may differ from that presented in Chapter 1. In some cases, the number of trade union members in the sector (based on which the density was calculated) was not available. When this was the case, as reported in the third column from the left, the density was calculated based on the available data. This is the case for Austria, Belgium, the Netherlands, Portugal and Sweden. In Finland, Greece, Italy, Romania and Spain, no data about membership were disclosed by any of the sector-related trade unions.

In six Member States for which membership data are available, trade union membership in the tanning and leather sector is reported as decreasing, while in two countries, namely France and Hungary, the figures show an increase. In the case of Hungary, it should be noted that the data provided refer to the higher-level NACE code of 15.1. In 10 Member States, sectoral trade unions' membership is considered stable. We also consider the trend to be stable in Member States where no sectoral trade union was active at the time of the previous sectoral representativeness study, from 2017. In contrast, in the case of Latvia and Lithuania, the lack of a trade union today points to a decline in membership, because one trade union was reported as active in the previous study.

Table 12 illustrates the position of trade unions active in the tanning and leather sector within the national industrial relations landscape and their capacity to influence the working conditions of workers in the industry. This is assessed in particular by looking at unions' involvement in multi-employer and single-employer collective bargaining and social dialogue, and in consultations with the government, and at their mobilisation capacity in national industrial action.

All trade unions (35) included in this study are considered representative at the national level. A total of 27 of them in 12 Member States engage in multi-employer collective bargaining (MEB). No multi-employer sectoral collective agreements exist in Croatia, Greece, Hungary, the Netherlands, Romania or Slovakia. However, trade unions in Croatia, Hungary, Romania and Slovakia bargain with single employers, delivering various degrees of coverage of the sectoral workforce. In Greece and the Netherlands, there is no MEB or single-employer collective bargaining (SEB) in the sector.

In all Member States where MEB takes place, workforce coverage is high, ranging from 80 % to 100 %. Austria should be included in this group, as the two relevant collective agreements – signed by GPA and PROGE – are complementary and therefore cover all workers in the industry. The Portuguese trade union Sindeq is a co-signatory of an MEB, with a coverage as low as 3 %, that runs in parallel with the much broader MEB signed by Fesete. In 7 of the 12 Member States where MEB covers the sector, trade unions also bargain at the company level. These are Belgium, Finland, France, Italy, Slovenia, Spain and Sweden.

Moreover, 21 trade unions in 8 Member States are involved in social dialogue and are regularly consulted by the national government, while 12 of the 35 active trade unions have mobilised their members in industrial action over the past three years.

Table 12: Involvement of sectoral trade unions in collective bargaining

	Trade union recognised as representative (national level)	MEB	SEB	Involved in social dialogue	Consulted by government	Involved in industrial action	National affiliation	industrialAll affiliation
Number of trade unions	35	27	20	21	21	12	30	30
Number of Member States	17	12	11	9	8	5	14	17
Member States with no trade unions	BG, EE, LT, LV, PL							

Source: Network of Eurofound Correspondents, 2023.

More detailed information by Member State can be found in the Annex (Table 50).

Table 13 explains the reasons for the fragmentation of trade unions at the national level. In Austria, the two trade unions active in the industry represent different categories of workers, while in all other Member States the main difference is the ideology of the trade unions that organise workers. In France and Sweden, trade unions also differ based on the categories of workers they organise.

Table 13: Reasons for fragmentation at the national level

Member State	Represent a specific profession	Represent different categories of workers in the sector	Represent different parts of the country	Represent different types of companies (microfirms, SMEs, larger companies)	Cover different parts of the sector	Ideological	Other reasons
AT		Yes					
BE						Yes	
BG	No trade unions						
CZ	No members in the sector (but involved in MEB covering workers in the tanning and leather sector)						
DE	Only one trade union						
DK							The one trade union is a member of a trade union association, which signs the main agreement. Therefore,

Member State	Represent a specific profession	Represent different categories of workers in the sector	Represent different parts of the country	Represent different types of companies (microfirms, SMEs, larger companies)	Cover different parts of the sector	Ideological	Other reasons
							both organisations are included.
EE	No trade unions						
EL	Only one trade union						
ES						Yes	
FI	Only one trade union						
FR		Yes				Yes	
HR	Only one trade union						
HU	Only one trade union						
IT						Yes	
LT	No trade unions						
LV	No trade unions						
NL						Yes	
PL	No trade unions						
PT						Yes	
RO	Only one trade union						
SE		Yes				Yes	
SI	Only one trade union						
SK	Only one trade union						

Note: SMEs = small and medium-sized enterprises.

Source: Network of Eurofound Correspondents, 2023.

## 2.2. Employer organisations

Table 14 illustrates the sector-relatedness of the 26 employer organisations and business associations active in the tanning and leather sector at the national level. In 7 of the 23 Member States studied there is no employer organisation representing companies in the industry.

A total of 19 of the 26 employer organisations studied have member companies working in the tanning of leather, making it the most widely covered part of the industry, followed by the processing of raw

hides and skins (17), the manufacture of various types of leather (17), the trading of hides and skins (11), the processing of precious fur (10) and leather repair activities (8). A total of 16 of the 26 employer organisations also cover the subsector of manufacture of finished leather goods, which pertains to NACE 15.12. All but seven employer organisations (data are missing for one employer organisation in Germany) have broader coverage than the tanning and leather sector. The sectors covered vary across Member States, spanning the footwear, textile, chemical, wholesale trade and woodworking sectors, among others.

Table 14: Sector coverage of sectoral employer organisations

	Total	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities	Other sectors covered	European affiliation
<b>Number of employer organisations</b>	26	17	19	17	10	11	16	8	18	9 <sup>(29)</sup>
<b>Number of Member States</b>	16	12	13	13	7	8	10	6	12	9
<b>Member States with no employer organisations</b>	BG, DK, EE, LT, LV, RO, SK									

Source: Network of Eurofound Correspondents, 2023.

<sup>(29)</sup> Nine organisations are affiliated to COTANCE. Seven organisations have different or additional European affiliations. See Table 51 for more information.

Table 15 shows the coverage of employer organisations by company size. The aggregate data reported in this table should be interpreted with caution, as no data are available for four employer organisations and only some data were provided for three other organisations. Hence, the actual aggregate data may differ from that presented below.

In line with the information on the sector and its entrepreneurial landscape provided in the first chapter, most affiliates of sectoral employer organisations are small companies (18), followed by medium-sized firms (13) and microenterprises (12). Only six employer organisations also have affiliate members that are large companies; this finding needs to be interpreted considering the general industrial context of the tanning and leather sector, in which large companies are scant and concentrated in a few Member States.

**Table 15: Categories of companies covered by sectoral employer organisations**

	<b>Self-employed tanners</b>	<b>Microcompanies (0–9 employees)</b>	<b>Small companies (10–49 employees)</b>	<b>Medium-sized companies (50–249 employees)</b>	<b>Large companies (250+ employees)</b>
<b>Number of employer organisations</b>	6	12	18	13	6
<b>Number of Member States</b>	6	10	14	11	5

*Note:* No data are available for MKSZ regarding the size of companies covered.

*Source:* Network of Eurofound Correspondents, 2023.

More detailed information by Member State is presented in the Annex (Table 52).

Table 16 provides information about the organisational density of the employer organisations active in the tanning and leather industry. This density relates to the coverage of both employers and their employees. These data must be interpreted with caution, since data are not available for all organisations.

The information populating this table is based on data provided by the Network of Eurofound Correspondents. The membership density and employment density of the employer organisations considered in this study have therefore been calculated based on national data.

In four Member States (Austria, France, Slovenia and Sweden), the workforce coverage of the sectoral employer organisations is above 80 %. High coverage is also reported in Croatia (57 %), Finland (64.8 %), Italy (51 %), Poland (46.8 %) and Spain (55 %). It should be noted that employment density was difficult to calculate in Germany and Portugal due to discrepancies in the data.

Table 16: Organisational density of sectoral employer organisations

Member State	Number of EOs covered by membership data	Number of EO members in the sector	Membership density (%)	Number of EOs covered by employees' data	Employees covered by EOs	Employment density (%)
AT	2	32	~ 100	2	Estimated 1 450	~ 90 <sup>(30)</sup>
BE	0	n.d.	n.d.	0	n.d.	n.d.
BG	No EOs					
CZ	1	0	0	1	0	0
DE	2	44 <sup>(31)</sup>	51	2	Estimated 4 174	— <sup>(32)</sup>
DK	No EOs					
EE	No EOs					
EL	1	6	14.6	1	70	12.5
ES	1	41	12.8	1	Estimated 1 587	55 <sup>(33)</sup>
FI	1	3	8.8	1	70	64.8
FR	1	55	40.7	1	1 600	92.9
HR	1	5	7.7	1	Estimated 2 000	Estimated 57
HU	1 <sup>(34)</sup>	1	0.2	1	113	2.8
IT	1 out of 2	165	Estimated 14.4	1 out of 2	Estimated 9 195	Estimated 51
LT	No EOs					
LV	No EOs					
NL	1	5	14.28	0	n.d.	n.d.

<sup>(30)</sup> The employer organisation BIMB provides only estimates of its employment coverage. This may explain the missing 10 % of the total employment density.

<sup>(31)</sup> The data provided by one of the employer organisations in Germany (ADL) concerning its membership and employee coverage are from 2016.

<sup>(32)</sup> Employment density cannot be calculated at the moment for Germany, for two reasons: the employee coverage information provided by the employer organisation VDL is higher than total employment in the sector, and the information provided by the employer organisation ADL regarding its membership and employee coverage is from 2016.

<sup>(33)</sup> Unlike in other cases, where we calculated employment density based on figures for employee coverage provided by the employer organisations, in the case of Spain the employer organisation Acexpiel provided the employment density as a percentage and then we estimated the figure for employee coverage.

<sup>(34)</sup> In Hungary, membership and employee coverage coincide between the two employer organisations reported previously because BCE is a member of MKSZ; therefore, we calculate and report the density for only one entity to avoid membership overlap.



Member State	Number of EOs covered by membership data	Number of EO members in the sector	Membership density (%)	Number of EOs covered by employees' data	Employees covered by EOs	Employment density (%)
PL	3	Estimated 77 <sup>(35)</sup>	Estimated 48.7	1	28	Estimated 46.8
PT	1	44	48.3	1	2 700 <sup>(36)</sup>	—
RO	No EOs					
SE	3	5	56.5	3	220	82
SI	3	6	75	3	~ 270	~ 97.4
SK	No EOs					

Notes: EO = employer organisation; n.d. = no data.

Source: Network of Eurofound Correspondents, 2023.

Table 17 illustrates the position of sectoral employer organisations and business associations within national industrial relations systems. It looks at their involvement in (multi-employer and single-employer) collective bargaining, social dialogue and consultations with governments.

A total of 20 of the 26 employer organisations and business associations considered are recognised as representative social partners at the national level. In five cases, the non-representative organisations are business associations, which do not engage in collective bargaining or social dialogue. Data are not available for Unionchimica in Italy.

A total of 16 employer organisations engage in MEB, with generally high levels of workforce coverage (for most organisations, coverage is between 80 % and 100 %). The situation is different in Czechia, where the MEB agreement signed by the Czech employer organisation ATOK covers around 20 % of the sectoral workforce. This is because the MEB agreement, in fact, pertains to NACE 15 as a whole, and was recently extended to the tanning and leather sector, today covering 50 employees; on account of this, ATOK is considered sector related). Only one employer organisation actively engages in SEB: AFLSI in Finland is active in both MEB and SEB. Moreover, 15 organisations are involved in social dialogue structures at the national level, and 13 are consulted by the government on a regular basis.

<sup>(35)</sup> The figures for Poland (number of members, employment coverage and related densities) should be interpreted with caution, because the Polish Eurofound correspondent suggested that the data provided by one of the employer organisations (OIBS) might be overestimated.

<sup>(36)</sup> The figure for employee coverage was provided by the employer organisation APICCAPS, which confirmed its increase in membership and employee coverage since 2016. However, the number of employees covered by its members is visibly higher than total employment in the sector, pointing to the potential overestimation of this figure.

Table 17: Involvement of sectoral employer organisations in collective bargaining

	Employer organisations recognised as representative (national level)	MEB	SEB	Involved in social dialogue	Consulted by government	National affiliation	COTANCE affiliation
Number of employer organisations	20	16	1	15	13	18	9
Number of Member States	16	11	1	12	10	13	9
Member States with no employer organisations	BG, DK, EE, LT, LV, RO, SK						

Source: Network of Eurofound Correspondents, 2023.

More detailed information, by Member State, is provided in the Annex (Table 53).

In Table 18, we report the reasons for fragmentation with regard to employer organisations for Member States with more than one employer organisation. In Austria, the two employer organisations represent companies of different size categories, while in Germany, Hungary, Poland and Sweden, employer organisations have diverse functions, with some participating in collective bargaining and others representing business interests. In Italy, the reasons for fragmentation are different ideological affiliations and coverage of different parts of the sector.

Table 18: Reasons for fragmentation with regard to employer organisations at the national level

Member State	Members in different parts of the country	Members in different types/sizes of companies	Cover different parts of the sector / different types of activities	Ideological	Some national employer organisations represent only the business/trade interests of their members, while others represent the same members for social dialogue and collective bargaining	Other reasons
AT		Yes				
BE	Only one employer organisation					
BG	No employer organisations					

Member State	Members in different parts of the country	Members in different types/sizes of companies	Cover different parts of the sector / different types of activities	Ideological	Some national employer organisations represent only the business/trade interests of their members, while others represent the same members for social dialogue and collective bargaining	Other reasons
CZ	Only one employer organisation					
DE					Yes	
DK	No employer organisations					
EE	No employer organisations					
EL	Only one employer organisation					
ES	Only one employer organisation					
FI	Only one employer organisation					
FR	Only one employer organisation					
HR	Only one employer organisation					
HU					Yes	
IT			Yes	Yes		
LT	No employer organisations					
LV	No employer organisations					
NL	Only one employer organisation					
PL					Yes	
PT	Only one employer organisation					
RO	No employer organisations					
SE			Yes		Yes	
SI						GZS has no members in the sector, but is a signatory of a cross-sectoral

Member State	Members in different parts of the country	Members in different types/sizes of companies	Cover different parts of the sector / different types of activities	Ideological	Some national employer organisations represent only the business/trade interests of their members, while others represent the same members for social dialogue and collective bargaining	Other reasons
						collective agreement, while OPZ has members in the sector and is not involved in collective bargaining
SK	No employer organisations					

Source: Network of Eurofound Correspondents, 2023.

## 2.3. Collective bargaining patterns and social dialogue practices

This section provides an overview of the involvement of social partners in the sector at the national level (Table 19), the level(s) of collective bargaining occurring in each of the Member States considered (MEB, SEB or both) (Table 20) and the collective bargaining coverage by bargaining level (Table 21).

Looking at Table 19, we can discern the extent to which sectoral trade unions and employer organisations engage in collective bargaining and at what level. Whereas 4 trade unions and 10 employer organisations have no involvement in collective bargaining, 17 trade unions and 1 employer organisation engage in both single- and multi-employer bargaining. Some 10 trade unions and 15 employer organisations engage only in multi-employer bargaining, while 4 trade unions are involved solely in single-employer bargaining.

Table 19: Involvement of employer organisations and trade unions in collective bargaining in the sector

	Number of trade unions	Number of employer organisations
<b>No collective bargaining</b>	EL (1), NL (2), PT (1) Total = 4	DE (1), EL (1), HR (1), HU (2), NL (1), PL (3), SI (1) Total = 10
<b>SEB</b>	HR (1), HU (1), RO (1), SK (1) Total = 4	
<b>MEB</b>	AT (2), CZ (1), DE (1), DK (2), PT (2), SE (2) Total = 10 <sup>(37)</sup>	AT (2), BE (1), CZ (1), DE (1), ES (1), FR (1), IT (2), PT (1), SE (3), SI (2) Total = 15
<b>Both SEB and MEB</b>	BE (3), ES (2), FI (1), FR (5), IT (4), SE (1), SI (1) Total = 17	FI (1) Total = 1
<b>Total</b>	35	26

Source: Network of Eurofound Correspondents, 2023.

Table 20 shows that in six Member States collective bargaining in the sector is conducted only at the multi-employer level (Austria, Czechia, Denmark, Germany, Italy and Portugal), in four only at the company level (Croatia, Hungary, Romania and Slovakia) and in six at both the company and the sectoral levels (Belgium, Finland, France, Slovenia, Spain and Sweden). In seven Member States, there is no collective bargaining in the tanning and leather sector.

Table 20: Form/level of bargaining by Member State

Form/level of bargaining	Member States
<b>MEB</b>	AT, CZ, DE, DK, IT, PT, SE
<b>MEB and SEB</b>	BE, ES, FI, FR, SE, SI
<b>SEB</b>	HR, HU, RO, SK
<b>No collective bargaining</b>	BG, EE, EL, LT, LV, NL, PL

Source: Network of Eurofound Correspondents, 2023.

Table 21 reports the coverage of collective agreements signed in the Member States studied. In Austria, Denmark, Germany, Italy and Portugal, where only multi-employer agreements are reached, their coverage is above 90 % of the workforce. The same coverage is found in Belgium, Finland, France, Slovenia and Spain, where both MEBs and SEBs exist. In Sweden, where both types of agreements are also reached, the coverage ranges from 80 % to 90 %. In Hungary, the single-employer bargaining agreement covers between 50 % and 80 % of the sectoral workforce, while SEB in Croatia, Romania and Slovakia covers between 1 % and 25 % of workers in the sector. In Czechia, the applicable MEB agreement, which is the result of an extension of the sectoral agreement in leather product manufacturing, covers between 1 % and 25 % of workers in the tanning and leather sector.

<sup>(37)</sup> In Czechia, a multi-employer collective agreement is in place that covers the textile, footwear and leather sector. OS TOK is a party to the agreement and is a member of industriAll; however, as mentioned above, it has not been included in this study as it has no members in the sector, and therefore no further information is provided about this trade union.

Table 21: Collective bargaining coverage by level

	Collective bargaining coverage				
	> 90 %	80–90 %	50–80 %	25–50 %	1–25 %
<b>SEB</b>			HU		HR, RO, SK
<b>MEB</b>	AT, DE, DK, IT, PT				CZ
<b>MEB and SEB</b>	BE, ES, FI, FR, SI	SE			
<b>No collective bargaining</b>	BG, EE, EL, LT, LV, NL, PL				

Source: Network of Eurofound Correspondents, 2023.

Table 22 provides a more detailed overview of collective bargaining agreement coverage, on the one hand, and of national regulations regarding extension mechanisms (and related criteria) and the social dialogue landscape, on the other. In 15 Member States, there are mechanisms in place to make collective agreements generally binding, and 6 states implement extension mechanisms applying to the tanning and leather sector to cover all workers with collective agreements. Seven Member States regulate what requirements and criteria the social parties have to meet in order to take part in single-employer bargaining.

Table 22: Collective bargaining coverage and extension mechanisms

Member State	Percentage of sectoral workforce covered by collective bargaining (SEB and MEB) (%)	Percentage of sectoral workforce covered by MEB (%)	Existence of a mechanism making collective bargaining agreements in the country generally binding	Existence of an extension mechanism in the tanning and leather sector covering all workers in collective bargaining	Existence of criteria for inclusion in the extension mechanism	Existence of requirements/criteria for taking part in SEB	Bipartite or tripartite social dialogue body in the sector	
							Bipartite	Tripartite
<b>AT</b>	100	100	Yes	Yes <sup>(38)</sup>	Yes	Yes	No	No
<b>BE</b>	96	96	No	No	No	No	Yes	No
<b>BG</b>	—	—	n.a.	n.a.	n.a.	n.a.	Yes	Yes
<b>CZ</b>	24	24	Yes, but not applicable to companies with 1–19 employees	No	Yes	No	No	No
<b>DE</b>	90	90	Yes	No	Yes	No	No	No
<b>DK</b>	100	100	No	No	No	No	No	No
<b>EE</b>	—	—	No	No	No	No	No	No
<b>EL</b>	—	—	Yes	No	Yes	n.a.	No	No
<b>ES</b>	100	100	Yes	Yes	No	No	Yes	No

<sup>(38)</sup> 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.

Member State	Percentage of sectoral workforce covered by collective bargaining (SEB and MEB) (%)	Percentage of sectoral workforce covered by MEB (%)	Existence of a mechanism making collective bargaining agreements in the country generally binding	Existence of an extension mechanism in the tanning and leather sector covering all workers in collective bargaining	Existence of criteria for inclusion in the extension mechanism	Existence of requirements/ criteria for taking part in SEB	Bipartite or tripartite social dialogue body in the sector	
							Bipartite	Tripartite
FI	100	100	Yes	Yes	Yes	No	No	No
FR	100	100	Yes	Yes	Yes	Yes	Yes	No
HR	8–10	0	Yes	No	Yes	No	No	Yes
HU	60	0	No	No	Yes	Yes	Yes	No
IT	100	100	No	No	No	Yes	No	No
LT	—	—	Yes	No	No	No	No	No
LV	—	—	Yes	No	Yes	No	No	No
NL	—	—	Yes	No	Yes	Yes	No	No
PL	—	—	No	n.a.	n.a.	No	No	No
PT	100	100	Yes	Yes	No	No	No	No
RO	Under 0.5	0	Yes	No	Yes	Yes	No	No
SE	80–90	80–90	No	n.a.	n.a.	No	No	No
SI	100	100	Yes	Yes	Yes	Yes	Yes	No
SK	16.7	0	Yes	No	No	No	No	Yes

Note: n.a. = not applicable.

Source: Network of Eurofound Correspondents, 2023.

Bipartite social dialogue structures are in place in 6 of the 23 Member States included in this study, and tripartite structures exist in 3 Member States. Table 23 includes more detailed information about the sectoral social dialogue bodies, their origin and their functions in the Member States where they exist.

Table 23: Tripartite and bipartite social dialogue bodies

Member State	Name of the body and scope of activity	Bipartite/ tripartite	Domain of activity	Origin (agreement/ statutory)	Participating trade unions	Participating employer organisations
AT	No formal bodies					
BE	Subsistence fund for the hide and leather industry and substitute products	Bipartite	Subsistence fund	Agreement	ACV-BIE, ABVV-FGTB ACCG, ACLVB-CGSLB	Ledercuir

## Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Name of the body and scope of activity	Bipartite/ tripartite	Domain of activity	Origin (agreement/ statutory)	Participating trade unions	Participating employer organisations
	JC128	Bipartite	Joint committee	Agreement	ACV-BIE, ABVV-FGTB ACCG, ACLVB-CGSLB	Ledercuir
BG	Industry Council for Tripartite Cooperation 'Light Industry' of the Ministry of Economy and Industry (cross-sectoral)	Tripartite	Health and safety, working conditions	Statutory – Labour Code	FOSIL, FLI CL Podkrepa	BATOK
	Cross-sectoral dialogue	Bipartite	Health and safety, working conditions	Statutory – Labour Code	FOSIL, FLI CL Podkrepa	BATOK
CZ	—					
DE	—					
DK	—					
EE	—					
EL	—					
ES	Joint Commission responsible for interpreting, monitoring and mediating the national sectoral collective tannery agreement	Bipartite	Interpreting, monitoring and mediating the current national sectoral collective tannery agreement	Agreement	CCOO and UGT	Acexpiel
FI	—					
FR	Commission paritaire permanente de négociation et d'interprétation	Bipartite	Negotiating agreements and amendments to branch-level agreements;	Statutory and agreement	CFE-CGC AGRO, FO Chimie, CGT-THCB, FS-CFDT, CFTC-CMTE	FFM, FFCM, FFTM



## Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Name of the body and scope of activity	Bipartite/ tripartite	Domain of activity	Origin (agreement/ statutory)	Participating trade unions	Participating employer organisations
	de la maroquinerie (Joint Standing Committee for Negotiation and Interpretation)		identifying company collective agreements; drawing up annual reports; issuing opinions on the interpretation of branch-level agreements			
	Commission paritaire nationale de l'emploi et de la formation professionnelle (National Joint Committee for Employment and Vocational Training)	Bipartite	Promoting vocational training in line with employment trends in the industry. The committee is also called upon to specify or adapt the rules for the operational implementation of training schemes (definition of qualifications specific to the branch, priority audiences and actions)	Agreement	CFE-CGC AGRO, FO Chimie, CGT-THCB, FS-CFDT, CFTC-CMTE	FFM, FFCM, FFTM
<b>HR</b>	Sectoral Council for Textile, Footwear, Leather and Rubber (cross-sectoral)	Tripartite	Wages, working conditions, health and safety at work	Agreement	n.d.	n.d.
<b>HU</b>	Light Industry Sectoral Committee (cross-sectoral)	Bipartite	Information, consultation, negotiation	Statutory	BDSZ	BDSZ
<b>IT</b>	Informal and non-permanent social dialogue activities between trade unions, employer organisations and the government				Filctem CGIL, FEMCA CISL, Uiltec UIL, UGL Chimici	UNIC
<b>LT</b>	—					
<b>LV</b>	—					

## Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Name of the body and scope of activity	Bipartite/ tripartite	Domain of activity	Origin (agreement/ statutory)	Participating trade unions	Participating employer organisations
NL	—					
PL	Social dialogue (cross-sectoral)	Tripartite	n.d.	Statutory	NSZZ „Solidarność”, Ogólnopolskie Porozumienie Związków Zawodowych, Forum Związków Zawodowych	Pracodawcy Rzeczypospolitej Polskiej, Konfederacja „Lewiatan”, Związek Rzemiosła Polskiego, Związek Pracodawców Business Centre Club, Związek Przedsiębiorców i Pracodawców, Federacja Przedsiębiorców Polskich
PT	—					
RO	—					
SE	—					
SI	Negotiating group for sectoral collective bargaining	Bipartite	Pay, working time, training	Agreement	ZSSS-Stupis	GZS, ZDS
SK	Economic and Social Council (cross-sectoral)	Tripartite	The council is a consultation and negotiation body of the government and social partners at the national level	Statutory. The council was established by Act No 103/2007 Coll (Law on tripartite consultations at the national level and on the amendment of some laws	The council has 21 members. It consists of seven representatives appointed by the government, seven representatives appointed by representative associations of employers and seven representatives appointed by representative	The Council has 21 members. It consists of seven representatives appointed by the government, seven representatives appointed by representative associations of employers and seven representatives

Member State	Name of the body and scope of activity	Bipartite/ tripartite	Domain of activity	Origin (agreement/ statutory)	Participating trade unions	Participating employer organisations
				(Tripartite Law))	associations of trade unions	appointed by representative associations of trade unions. Unfortunately, employers in the field of leather processing do not have representatives on the council

Note: n.d. = no data.

Source: Network of Eurofound Correspondents, 2023.

In four Member States (Belgium, France, Italy and Spain) paritarian organisations exist in the tanning and leather sector. Table 24 provides information about these bodies, looking in particular at the participating employer organisations and trade unions, and the origin of the paritarian bodies and their domain of activities. In France and Spain, the main remit of the sectoral paritarian bodies relates to education and training in the sector, which, as discussed in Chapter 1, is a key issue in the sector today. The Belgian paritarian body is active on employment- and unemployment-related issues, while in Italy two paritarian bodies exist, one establishing a pension fund and the second more generally acting as an observatory in the sector.

Table 24: Paritarian organisations in the sector

Member State	Name of the organisation	Origin (agreement/ statutory)	Year established	Domain of activity	Participating trade unions	Participating employer organisations
AT	—					
BE	Subsistence fund for the hide and leather industry and substitute products	MEB	2017	Employment and unemployment	ACV-BIE, ABVV-FGTB ACCG, ACLVB-CGSLB	Ledercuir
BG	—					
CZ	—					

Representativeness of the European social partner organisations: Tanning and leather sector

DE	—					
DK	—					
EE	—					
EL	—					
ES	Paritarian Sectoral Training Commission – Tanning	Multisectoral bargaining	2015	Vocational education and training	UGT-FICA, CCOO-Industria	Acexpiel
FI	—					
FR	OPCO 2i	MEB	2018	Vocational education and training	CFE-CGC AGRO, FO Chimie, CGT-THCB, FS-CFDT, CFTC-CMTE	FFM, FFCM, FFTM
HR	—					
HU	—					
IT	Osservatorio Nazionale della Conceria (National Observatory of Tanning)	Informal	n.a.	Observation of the main trends in the sector	Filctem CGIL, FEMCA CISL, Uiltec UIL	UNIC
	Previmoda (cross-sectoral)	Multisectoral bargaining	1998	Pension fund	Filctem CGIL, FEMCA CISL, Uiltec UIL	ANCI, Aimpes, AUIL, ANPO ANFAO, Assospazzole, Assoscrittura, Assogiocattoli
LT	—					
LV	—					

## Representativeness of the European social partner organisations: Tanning and leather sector

NL	—					
PL	—					
PT	—					
RO	—					
SE	—					
SI	—					
SK	—					

*Note:* n.a. = not applicable.

*Source:* Network of Eurofound Correspondents, 2023.

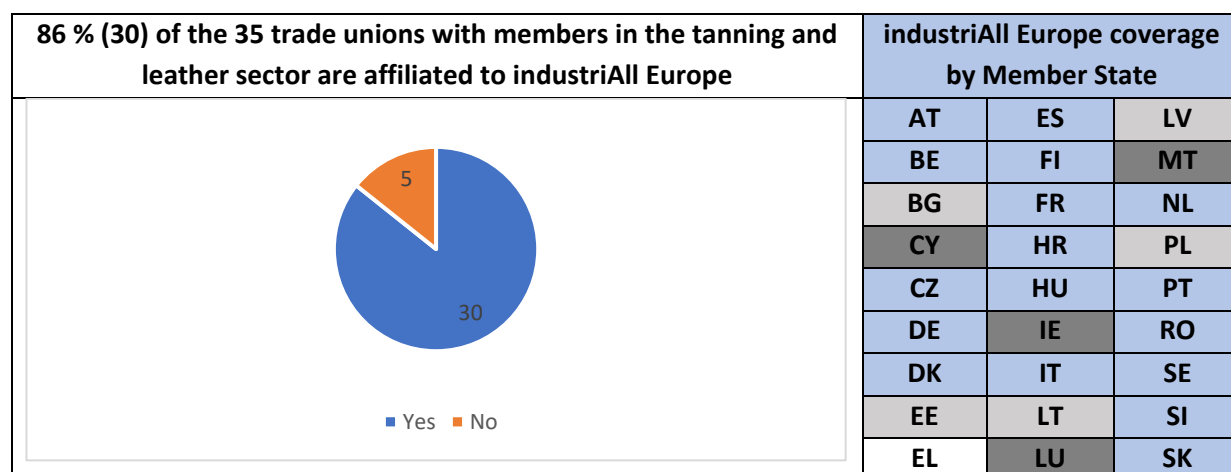
### 3. European-level representation

This chapter presents an assessment of European-level social partners in the tanning and leather industry. It does so by first presenting the sector coverage and membership strength of industriAll Europe and COTANCE in the 23 Member States included in the study. It then assesses the limits of the representativeness of the two EU-level organisations, which participate in the ESSDC, by examining the membership strength of national sectoral organisations that are not affiliated to them. The chapter concludes with an assessment of the representativeness of other EU-level organisations with members active in the tanning and leather industry.

#### 3.1. Representativeness of industriAll Europe

industriAll Europe represents 7 million workers in the metal, chemical, energy, mining, textile, clothing and footwear sectors and related industries and activities across Europe (industriAll Europe, undated). It is the European branch of the larger IndustriALL Global Union.

Figure 4: Share (and number) of trade unions represented by industriAll Europe that organise workers in the tanning and leather sector, EU-23



*Note:* Blue-shaded cells indicate Member States with trade unions in the tanning and leather sector represented by industriAll Europe; cells shaded in dark grey indicate Member States in which there are no tanning and leather activities; cells shaded in light grey represent Member States in which there are tanning and leather activities but there are no trade unions representing workers in the sector; and cells with no shading indicate Member States in which there are trade unions organising workers in the sector, but they are not affiliated to industriAll Europe.

*Source:* Based on data in Table 8 in Chapter 2.

Of the 35 trade unions active in the tanning and leather industry (see Chapter 2), 30 organisations in 17 Member States are affiliated to industriAll Europe (see Figure 4). This means that 86 % of all sector-related worker organisations are members of industriAll Europe. Calculations based on the available data – presented in Table 11 in Chapter 2 and Table 28 – suggest that industriAll Europe members in the tanning and leather industry cover 99.2 % of all unionised workers in the industry and slightly more than 10 % of the total sectoral workforce across Europe. Estimates of the workforce covered by industriAll Europe affiliates should be considered substantially conservative, given the widespread

missing data on trade union membership, including on several organisations affiliated to industriAll Europe (see Table 28 for more details).

industriAll Europe has members in the tanning and leather industry in all the Member States where labour is organised in the industry except Greece, where the only trade union active in the industry is not affiliated to industriAll Europe (or any other EU-level organisation).

Table 25 provides a detailed account of the parts of the sector covered by industriAll Europe affiliates. Nine sector-related unions – active in Austria, Belgium, Italy and Sweden – cover all parts of the industry and other sectors, spanning the chemical industry and the textile sector, among others. The unions thereby demonstrate sectoral overlap. Another 20 sectoral unions cover only some parts of the tanning and leather sector while also representing workers in other industries, therefore exhibiting sectional overlap.

Table 25: Sector coverage of trade unions affiliated to industriAll Europe in the tanning and leather sector

Member State	Trade union	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities	Other sectors covered	European affiliation
AT	PROGE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Blue-collar workers, temporary agency workers, apprentices and retirees in the private sector in the metalworking, mining, energy, textile, agriculture, food processing, tobacco, chemical, glass production, paper, vulcanisation, mineral oil and gas sectors	industriAll Europe
BE	ACV-BIE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Construction, energy, industrial sectors	industriAll Europe, EFBH, UNI Europa
	ACLVB-CGSLB	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Almost all sectors	industriAll Europe
	ABVV-FGTB ACCG	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Mainly production and industrial sectors	industriAll Europe
CZ	OS TOK <sup>(39)</sup>								Footwear, textile	industriAll Europe

<sup>(39)</sup> Despite having no members in the sector, this union is included as a co-signatory of a multisectoral collective agreement covering some workers in the sector.



Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities	Other sectors covered	European affiliation
DE	IG BCE	Yes	Yes				Yes		Mining, chemical, pharmaceuticals, synthetic fibres, energy, glass, rubber, ceramics, plastics processing, leather, mineral oil, paper and pulp production, renovation and disposal	industriAll Europe
DK <sup>(40)</sup>	3F				Yes		Yes	Yes	Blue-collar workers in both the private and the public sectors	industriAll Europe <sup>(41)</sup>
	CO-industri				Yes		Yes	Yes	Entire manufacturing sector	industriAll Europe
ES <sup>(42)</sup>	CCOO-Industria	Yes	Yes	Yes	Yes	Yes	Yes		Textile and other industrial sectors	industriAll Europe
	UGT-FICA	Yes	Yes	Yes	Yes	Yes	Yes		Agri-food, capital goods and ICT, construction and mining, energy and water, automotive, chemical, textile	industriAll Europe

<sup>(40)</sup> Denmark's only tannery (Scan-Hide) is included under a different NACE code, and the few other companies in the sector work mainly with fur; hence, NACE 15.11 mostly includes fur-related activities in the country.

<sup>(41)</sup> The trade union 3F is indirectly affiliated to industriAll through its affiliation to CO-industri, which is a member of industriAll.

<sup>(42)</sup> Both Spanish trade unions are affiliated to industriAll; however, the national correspondent was unsure if they were affiliated for the tanning and leather sector specifically, because the trade unions did not respond to their queries.

Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities	Other sectors covered	European affiliation
									and graphic arts, iron and steel	
FI	Teollisuusliitto RY	Yes	Yes	Yes	Yes	Yes	Yes		Textile, chemical, technology, wood products	industriAll Europe
FR	CGT-THCB	Yes	Yes	Yes					Textile, clothing, industrial laundry	industriAll Europe
	FS-CFDT	Yes	Yes	Yes		Yes	Yes		Retail, accommodation, catering, tourism, cleaning, nursery assistants, personal services, safety and accident prevention, non-profit organisations, legal professions, real estate, textile, temporary work, consular chambers (chambers of commerce and industry, chambers of trade and crafts), employees of private employers	industriAll Europe
	FO Chimie	Yes	Yes	Yes		Yes	Yes		Commerce, hospitality, services and other sectors.	industriAll Europe
	CFTC-CMTE	Yes	Yes	Yes		Yes	Yes		Metal, energy, textile	industriAll Europe

Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities	Other sectors covered	European affiliation
HR	SIND TOKG	Yes	Yes	Yes					Textile, rubber	industriAll Europe
HU	BDSZ			Yes			Yes		Textile, garment, miners, energy	industriAll Europe
IT	Filctem CGIL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical, energy, textile	industriAll Europe
	FEMCA CISL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical, energy, textile	industriAll Europe
	Uiltec UIL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical, energy	industriAll Europe
NL	FNV		Yes						All sectors	industriAll Europe
	CNV	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	All sectors	industriAll Europe
PT	Fesete	Yes	Yes	Yes	Yes	Yes	Yes		Textile, clothing, footwear and related sectors	industriAll Europe
	SIMA	Yes	Yes	Yes	Yes	Yes	Yes		Chemical, energy, textile	industriAll Europe

Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities	Other sectors covered	European affiliation
	Sindeq <sup>(43)</sup>								Chemical, energy	industriAll Europe
RO	Confpeltex	Yes	Yes	Yes		Yes	Yes		Chemical, energy	industriAll Europe
SE	Unionen	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical, energy, textile	industriAll Europe
	IF Metall	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical, energy	industriAll Europe
SI	ZSSS-Stupis		Yes				Yes		Chemical, energy	industriAll Europe
SK	IOZ	Yes	Yes	Yes					Chemical, energy, textile	industriAll Europe

Notes: Empty cells indicate no coverage. n.d. = no data.

Source: Network of Eurofound Correspondents, 2023.

<sup>(43)</sup> The trade union Sindeq does not have members in the sector; hence, it has no specific coverage of the sector. The trade union was included in the table because it co-signed a collective bargaining agreement (as a member of the federation Feticeq) in 2003, when it may have had members in the sector. The agreement is still valid.

Of the 30 national trade union members of industriAll Europe, 29 represent employees in the tanning and leather sector in 16 Member States, 16 cover management staff and 22 cover other staff in the sector (e.g. temporary agency workers) (see Table 26). Workers with primary and secondary education are represented by 24 and 25 trade unions, respectively, while 20 unions cover workers with tertiary education. Finally, with regard to company size, the majority of trade unions organise sectoral workers in small enterprises (24 unions in companies with 0–9 employees and 23 in those with 10–49 employees). A total of 21 labour organisations represent companies with 50–249 employees and 11 represent larger enterprises. As already mentioned in Chapter 2, the lack of representation of large companies is, in the case of the tanning and leather industry, due to the absence of large enterprises in the industry in most Member States, with a few exceptions where the sector is more prominent.

**Table 26: Categories of workers covered by trade unions affiliated to industriAll Europe in the tanning and leather sector**

	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Education level			Company size (number of employees)			
						Primary	Secondary	Tertiary	0–9	10–49	50–249	250+
<b>Number of trade unions</b>	29	7	5	16	22	24	25	20	24	23	21	11
<b>Number of Member States</b>	16	4	2	8	12	14	15	12	12	12	12	8

Source: Network of Eurofound Correspondents, 2023.

Tables 27 and 28 display data about the membership strength of the national trade unions affiliated to industriAll Europe. In 16 of the 17 Member States with sector-related trade unions, the largest trade union at the national level is a member of industriAll Europe. In six Member States, the second largest unions are affiliated to industriAll Europe.

Among trade unions affiliated to industriAll Europe, six report an increase in membership, six a decrease and six general stability in their membership base. Seven trade unions did not release data about their membership and the trend therein. Table 28 gives a more detailed account of the membership strength of every trade union that is a member of industriAll Europe.

Table 27: Overview of the membership strength of trade unions in the tanning and leather sector affiliated to industriAll Europe

	Total	Trend	Ranking across the entire tanning and leather sector
Number of trade unions	30	Increasing: 6 Stable: 6	Largest <sup>(45)</sup> : 16 Second largest: 6
Number of Member States	17	Decreasing: 6 No data <sup>(44)</sup> : 7	Third largest: 3 No data: 0
Member States with no trade unions	6 (BG, CZ, EE, LT, LV, PL)		

Source: Network of Eurofound Correspondents, 2023.

Table 28: Detailed account of the membership strength of trade unions in the tanning and leather sector affiliated to industriAll Europe

Member State	Trade union	Trade union members in the sector	Density (%)	Membership trend	Ranking <sup>(46)</sup>
AT	PROGE	278	17.3	Decreasing	First
BE <sup>(47)</sup>	ACV-BIE	120	—	—	Third
	ACVLB-CGSLB	3	—	—	Second
	ABVV-FGTB ACCG	n.d.	—	—	First
CZ	OS TOK	0	—	—	n.a.
DE	IG BCE	1 500	64.9 <sup>(48)</sup>	Decreasing	First
DK <sup>(49)</sup>	CO-industri	10	31.3	Stable	Negotiating association
	3F	10	31.3	Stable	First
ES	CCOO-Industria	n.d.	n.d.	n.d.	Unclear which is the largest; both equally important

<sup>(44)</sup> In four more cases, the trend in membership is difficult to estimate due to overestimations or discrepancies in data.

<sup>(45)</sup> In Spain, both CCOO-Industria and UGT-FICA are considered to rank first because they are reported as being equally important in the sector.

<sup>(46)</sup> Where two options are given in this column, there are insufficient data to determine clearly whether one or the other is correct.

<sup>(47)</sup> A discrepancy emerges in Belgium between total employment and trade union membership, which makes estimates of density and trends hard to report. The discrepancy may be due to the different sources from which the figures were drawn, namely Eurostat's SBS for the figure for total employment and the trade unions for trade union membership.

<sup>(48)</sup> The membership trend is difficult to estimate due to contradictory evidence provided by the trade union to the national correspondent: while the union argues that its membership in the sector has been decreasing, the figures it provided for its membership seem to have doubled since the last representativeness study in the sector (based on data from 2016).

<sup>(49)</sup> In Denmark, trade union membership is the same for 3F and CO-industri, as CO-industri is the trade union association, of which 3F is part, that engages in collective bargaining. Hence, although we consider both representative, we only consider their membership once to avoid overlap.

## Representativeness of the European social partner organisations: Tanning and leather sector

	UGT-FICA	n.d.	n.d.	n.d.	Unclear which is the largest; both equally important
<b>FI</b>	Teollisuusliittori	n.d.	n.d.	Decreasing	First
<b>FR</b> <sup>(50)</sup>	CGT-THCB	60	3.5	Increasing	First
	FS-CFDT	37	2.1	Increasing	Second
	FO Chimie	29	1.7	Increasing	Third
	CFTC-CMTE	21	1.2	Increasing	Fourth
<b>HR</b>	SIND TOKG	75	2.1 <sup>(51)</sup>	Decreasing	First
<b>HU</b> <sup>(52)</sup>	BDSZ	700–800	18.5	Increasing	First
<b>IT</b>	Filctem CGIL	n.d.	n.d.	n.d.	First
	FEMCA CISL	n.d.	n.d.	n.d.	Second or third
	Uiltec UIL	n.d.	n.d.	n.d.	Second or third
<b>NL</b>	FNV	Approximately 20	4.9	Decreasing	First
	CNV	n.d.	n.d.	n.d.	Second
<b>PT</b>	Fesete	550	28.2	Decreasing	First
	SIMA	n.d. <sup>(53)</sup>	—	Increasing	Second
	Sindeq <sup>(54)</sup>	0	0	—	—
<b>RO</b>	Confpeltex	n.d.	n.d.	n.d.	First
<b>SE</b>	Unionen	57	21.3	Stable	Second
	IF Metall	120	44.8	Stable	First
<b>SI</b>	ZSSS-Stupis	30	11	Stable <sup>(55)</sup>	First
<b>SK</b>	IOZ	360	35.6	Stable	First

Notes: n.a. = not applicable; n.d. = no data.

Source: Network of Eurofound Correspondents, 2023.

The capacity of the trade unions affiliated to industriAll Europe to improve the working conditions of their members by engaging in collective bargaining and social dialogue is reported in Table 29. Twenty-

<sup>(50)</sup> Trade union membership figures for France are estimates by the national correspondent based on average union density in the country, due to a lack of membership data from the representative trade unions in the sector. They should therefore be interpreted with caution.

<sup>(51)</sup> Based on national data; see comments above regarding the discrepancies between national and SBS employment data.

<sup>(52)</sup> The figures for Hungary refer to trade union members under both NACE 15.11 and NACE 15.12.

<sup>(53)</sup> The Portuguese national correspondent deems the membership data provided by SIMA to be significantly overestimated and unrealistic; hence, we mark the union as having ‘no data’.

<sup>(54)</sup> The Portuguese trade union Sindeq has no members in the tanning and leather sector but is included because it is a co-signatory of a collective agreement that applies to the sector.

<sup>(55)</sup> The trade union SIMA maintains that membership in the sector is stable, yet the membership figures provided are higher than those in the previous sectoral representativeness study (2017).

three trade unions in 11 Member States (all but Croatia, Hungary, the Netherlands, Romania and Slovakia) engage in collective bargaining at the sectoral level, while 19 engage in SEB: three trade unions engage only in single-employer bargaining (SIND TOKG in Croatia, BDSZ in Hungary and Confpeltex in Romania), while 16 unions engage in both multi- and single-employer bargaining. Some 19 organisations are involved in social dialogue in 10 Member States (Austria, Belgium, Croatia, France, Hungary, Italy, Portugal, Slovakia, Slovenia and Spain), and 19 are consulted regularly by the national governments of 9 countries (Austria, Belgium, France, Italy, the Netherlands, Romania, Slovenia, Spain and Sweden). Eleven unions have mobilised their sectoral members in industrial action over the past three years.

**Table 29: Overview of involvement of trade unions affiliated to industriAll Europe in collective bargaining in the tanning and leather sector**

	Trade unions recognised as representative (national level)	MEB	SEB	Involved in social dialogue	Consulted by government	Involved in industrial action	National affiliation
<b>Number of trade unions</b>	30	23	19	19	19	11	28
<b>Number of Member States</b>	17	11	11	10	9	5	15
<b>Member States with no trade unions</b>	BG, EE, LT, LV, PL						

Source: Network of Eurofound Correspondents, 2023.

Since the previous representativeness study, the number of industriAll Europe members has declined from 36 to 30 for the following reasons (beyond the impact of Brexit – that is, the departure of the United Kingdom from the EU). In Austria, the industriAll Europe member GPA was previously included, but has since indicated that it has no members in the sector. Similarly, in Belgium BBTK/Secta and CNE indicated that they are no longer active in the sector and that their competences in this regard have been transferred to ACCG and ACV-BIE (members of industriAll Europe). The Finnish union TEAM has become part of Teollisuusliitto RY, and Pro does not have members in the sector. In Spain, the industriAll Europe member ELA IE is currently not a signatory of any collective agreements in the sector. The Latvian trade union LIA and the Lithuanian union LPIPS also declared that they no longer have members in the sector. Furthermore, in Czechia CZ TOZ represents workers in the sector, and in Portugal Sindeq signs collective agreements in the sector.

## 3.2. Representativeness of COTANCE

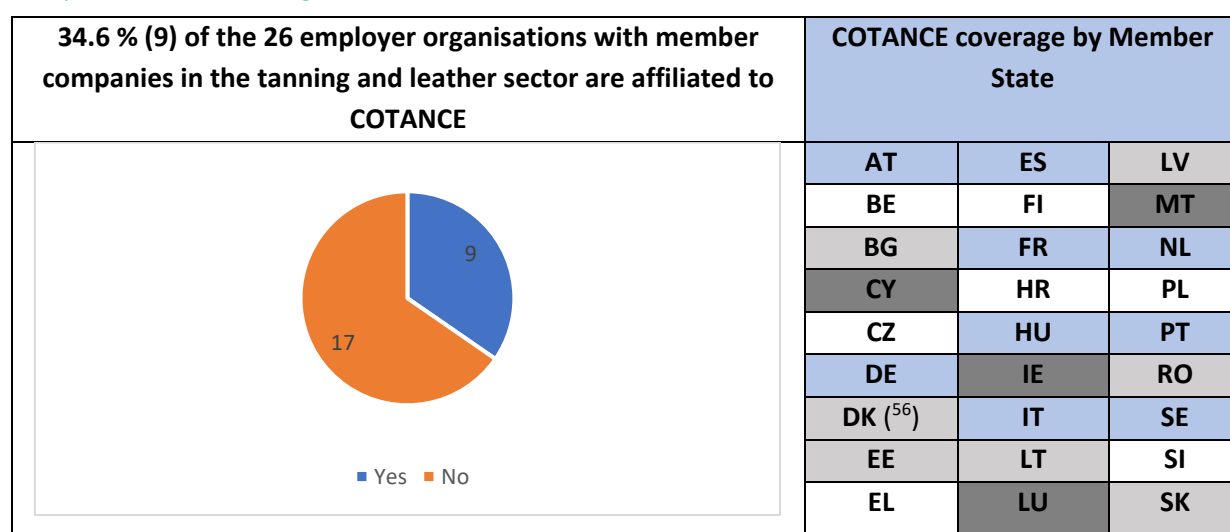
COTANCE represents companies in the tanning and leather industry at the European level. Within the geographical and sectoral scope of this study, COTANCE has nine member organisations in nine Member States. Two more employer organisations are part of COTANCE but are not included in this



study: the Danish company Scan-Hide, which is excluded as it applies to a different NACE code, and the employer organisation Leather UK, which falls outside the geographical scope of this study.

Figure 5 shows the presence of COTANCE members in the 23 Member States considered in this study (no sectoral employer organisations exist in seven Member States). The employer organisations affiliated to COTANCE represent 34.6 % of the total number (26) of sector-related employer organisations active in the Member States included in this study. Through its members, COTANCE covers 79 % of all companies organised in Europe, and thereby 83.3 % of the sectoral workforce at the national level. In absolute terms, hence looking at the total workforce in Europe, COTANCE members cover 48.8 % of workers in the tanning and leather sector (calculations are based on available data displayed in Table 15 in Chapter 2 and Table 33).

Figure 5: Share (and number) of employer organisations represented by COTANCE that organise companies in the tanning and leather sector, EU-23



*Note:* Blue-shaded cells indicate Member States with employer organisations in the tanning and leather sector represented by COTANCE; cells shaded in dark grey indicate Member States in which there are no tanning and leather activities; cells shaded in light grey represent Member States in which there are tanning and leather activities but there are no employer organisations representing companies in the sector; and cells with no shading indicate Member States in which there are employer organisations representing companies in the sector, but they are not affiliated to COTANCE.

*Source:* Based on data in Table 8 in Chapter 2.

Table 30 and Table 31 illustrate the sector-relatedness of COTANCE member organisations. Looking at Table 30, four employer organisations affiliated to COTANCE (Acexpiel in Spain, UNIC in Italy, FNL in the Netherlands and SG in Sweden) cover the tanning and leather sector only. Among them, UNIC and SG cover all parts of the industry. The other two represent companies in some parts of the sector. In the five remaining cases, the employer organisation covers some parts of the tanning and leather sector, along with other sectors in, for example, the footwear, textile and chemical industries.

<sup>(56)</sup> With regard to Denmark, the employer organisation DI indicated to the Eurofound correspondent that it has no members in the tanning and leather sector (NACE 15.11). The company Scan-Hide, a COTANCE member, recorded activity in the sector in the past, but is currently active mainly in NACE 10.11 (slaughtering).

Most COTANCE member organisations (eight out of nine) represent small companies, with between 10 and 49 employees (Table 31). Five employer organisations affiliated to COTANCE cover microenterprises (with fewer than nine employees), while six and four represent medium-sized and large companies, respectively.

Table 30: Sector coverage of employer organisations affiliated to COTANCE

Member State	Employer organisation	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities <sup>(57)</sup>	Other sectors covered	European affiliation
AT	FV TBSL	Yes	Yes	Yes	Yes				Textile and clothing	COTANCE
DE	VDL	Yes	Yes	Yes		Yes	Yes		Chemical, footwear, retail	COTANCE
ES	Acexpiel	Yes	Yes	Yes	Yes	Yes				COTANCE
FR	FFTM	Yes	Yes	Yes					Traders, brokers in tanning	COTANCE
HU	MKSZ (BCE)						Yes		Footwear, textile, garments	COTANCE, CEC
IT	UNIC	Yes	Yes	Yes	Yes	Yes	Yes	Yes		COTANCE
NL	FNL	Yes	Yes	Yes						COTANCE
PT	APICCAPS	Yes	Yes	Yes					Wholesale of leather, wholesale of chemical products	COTANCE
SE	SG	Yes	Yes	Yes	Yes	Yes	Yes	Yes		COTANCE

Note: Empty cells indicate no coverage.

Source: Network of Eurofound Correspondents, 2023.

<sup>(57)</sup> Leather repair activities are not part of the tanning and leather sector in France, Hungary or Slovenia.

Table 31: Categories of companies covered by sectoral employer organisations affiliated to COTANCE

	Self-employed tanners	Microcompanies (0–9 employees)	Small companies (10–49 employees)	Medium companies (50–249 employees)	Large companies (250+ employees)
<b>Number of employer organisations</b>	2	5	8	6	4
<b>Number of Member States</b>	2	5	8	6	4

Source: Network of Eurofound Correspondents, 2023.

The strength of COTANCE's membership can be assessed based on the data reported in Tables 32 to 34. COTANCE affiliates generally display stability in their membership (in seven out of nine, membership is stable), and all of them are the largest sectoral employer organisations in their Member States. Table 33 offers a more detailed account of each COTANCE-affiliated employer organisation's membership and employment density.

Table 32: Overview of COTANCE-affiliated employer organisations' membership strength in the sector

	Total	Trend	Ranking across the entire tanning and leather sector
<b>Number of employer organisations</b>	9	Increasing: 0 Stable: 7	Largest: 9 Second largest: 0
<b>Number of Member States</b>	9	Decreasing: 1 No data: 1	No data: 0
<b>Member States with no employer organisations</b>	7 (BG, DK, EE, LT, LV, RO, SK)		

Source: Network of Eurofound Correspondents, 2023.

Table 33: Detailed account of COTANCE-affiliated employer organisations' membership strength in the sector

Member State	Employer organisation	Number of members (companies) in the sector	Membership density (%)	Collective workforce of members in the sector	Employment density (%)	Membership trend	Ranking
AT	FV TBSL	3	9.4	1 142	71.4	Stable	First (among large companies)
DE	VDL	70	32.5	3 000	— <sup>(58)</sup>	n.d.	First
ES	Acexpiel	41	12.8	55 % of the national workforce	55.4	Stable	First
FR	FFTM	55	40.7	1 600	92.9	Stable	First
HU	MKSZ	1	0.2	113	2.8	Stable	First
IT	UNIC	165	Estimated 14.4	~ 51 % of the national workforce	Estimated 51	Stable	First
NL	FNL	5	14.3	n.d.	n.d.	Decreasing	First
PT	APICCAPS	44	48.3	~ 2 700	— <sup>(59)</sup>	Stable	First
SE	SG	4	44.4	~ 214	79.8	Stable	First

Note: n.d. = no data.

Source: Network of Eurofound Correspondents, 2023.

<sup>(58)</sup> Employment density cannot be calculated for the German employer organisation VDL, mainly due to discrepancies between figures for total employment in the sector and the data on employment coverage provided by the organisation (the latter are higher than total employment in the sector).

<sup>(59)</sup> Employment density cannot be calculated for the Portuguese employer organisation APICCAPS, mainly due to discrepancies between figures for total employment in the sector and the data on employment coverage provided by the organisation (the latter are higher than total employment in the sector).

Table 34: Overview of COTANCE-affiliated employer organisations' involvement in collective bargaining in the tanning and leather sector

	Employer organisations recognised as representative (national level)	MEB	SEB	Involved in social dialogue	Consulted by government	National affiliation
Number of employer organisations	8 <sup>(60)</sup>	6	0	7	6	8
Number of Member States	8	6	0	7	6	8
Member States with no employer organisations	BG, DK, EE, LT, LV, RO, SK					

Source: Network of Eurofound Correspondents, 2023.

All COTANCE-affiliated members are considered representative organisations in their national industrial relations systems, except for the German organisation VDL, which is a business association and does not take part in collective bargaining, and therefore does not need to fulfil any criteria to be recognised as a collective bargaining partner. Yet VDL participates in nationwide dialogue in the leather industry, together with its partner organisation ADL (which engages in collective bargaining; see Section 3.3). Six COTANCE members take part in MEB (FV TBSL in Austria, Acexpiel in Spain, FFTM in France, UNIC in Italy, APICCAPS in Portugal and SG in Sweden). None of them engages in single-employer bargaining. Six employer organisations are consulted by the government (all but VDL in Germany, MGSK in Hungary and FNL in the Netherlands), and seven are involved in sectoral social dialogue (all except FNL and SG).

The previous representativeness study for the sector listed 14 countries (including the United Kingdom, which is not included in this study). The reduction in the number of countries that are members can be explained as follows: in Belgium, Unitan, the member organisation mentioned in the last representativeness study, ceased to exist. Another organisation active in the sector (Leder cuir) is not a member of COTANCE. Similarly, the previous Bulgarian member, Bulffhi, is no longer registered in the country's commercial register of organisations. A new organisation that brings together some of the former members of Bulffhi (BATOK) is not a member of COTANCE. The Romanian organisation APPBR is no longer active. In Denmark, the company Scan-Hide, which is a member of COTANCE and recorded activity in the sector in the past, is currently active mainly in NACE 10.11.

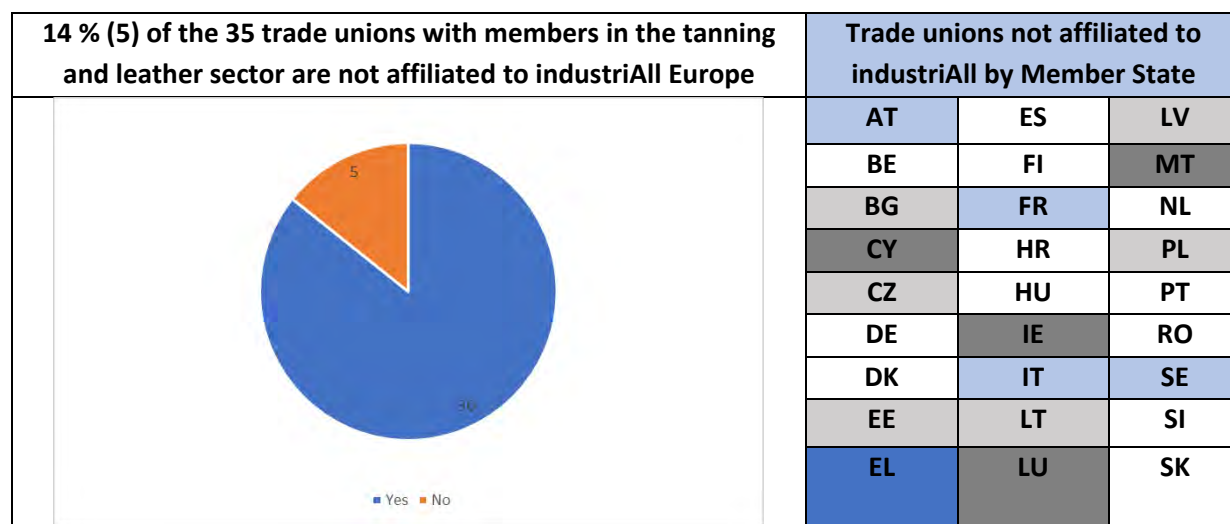
### 3.3. Trade unions not represented on the tanning and leather ESSDC

This section scrutinises the national sector-related trade unions that are not members of industriAll Europe, with a view to assessing potential limitations to the representativeness of industriAll Europe. Five trade unions organise workers in the sector in five Member States. Only in one case – that of the

<sup>(60)</sup> Only one of COTANCE's affiliates is not considered representative, and that is VDL, from Germany. VDL is a business association and as such does not take part in collective bargaining.

trade union Oekide in Greece – is the organisation the only trade union active in the Member State. The trade unions not affiliated to industriAll Europe account for 14 % of all sector-related trade unions across the Member States studied, and they represent 0.8 % of the organised workforce and 0.07 % of the total workforce in the tanning and leather sector in Europe.

Figure 6: Share (and number) of trade unions organising workers in the tanning and leather sector not represented on the tanning and leather ESSDC, EU-23



*Note:* Cells shaded in light blue indicate Member States with, in the tanning and leather sector, some trade unions not represented by industriAll Europe and some represented by industriAll Europe; cells shaded in dark blue indicate Member States in which sectoral trade unions are not represented by industriAll Europe; cells shaded in dark grey represent Member States in which there are no tanning and leather activities; cells shaded in light grey represent Member States in which there are tanning and leather activities but there are no trade unions representing workers in the sector; and cells with no shading indicate Member States in which all trade unions organising workers in the industry are affiliated to industriAll Europe.

*Source:* Based on data in Table 8 in Chapter 2.

Table 35 illustrates the subsectors of the tanning and leather industry covered by the five trade unions that are not members of industriAll Europe. Three of them cover all parts of the industry, and other sectors (e.g. the chemical, textile and footwear sectors), while one covers five subsectors and one covers six subsectors, in combination with other sectors.

Table 35: Sector coverage of trade unions not represented on the tanning and leather ESSDC

Member State	Trade union	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities	Other sectors covered	European affiliation
AT	GPA	Yes	Yes	Yes	Yes	Yes	Yes	Yes	White-collar workers in almost all sectors	n.d. <sup>(61)</sup>
EL	Oekide	Yes	Yes	Yes	Yes	Yes	Yes		Textile	None
FR	CFE-CGC AGRO	Yes	Yes	Yes		Yes	Yes		Agriculture, agri-food	EFFAT
IT	UGL Chimici	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical	n.d.
SE	Ledarna	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical	None

Notes: Empty cells indicate no coverage. n.d. = no data.

Source: Network of Eurofound Correspondents, 2023.

<sup>(61)</sup> The trade union GPA did not provide information regarding its European affiliation.



Some specificity emerges for some of the trade unions not affiliated to industriAll Europe with regard to the categories of workers they represent (see Table 36). CFE-CGC AGRO in France and Ledarna in Sweden represent mostly management staff, therefore primarily covering workers with tertiary education. For the three other trade unions, representation is broader in terms of both employment status and education level. All of the trade unions organise workers in micro-, small and medium-sized companies, and two (GPA in Austria and UGL Chimici in Italy) also cover large companies, with over 250 employees.

Table 36: Categories of workers covered by trade unions not affiliated to industriAll Europe in the tanning and leather sector

	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Education level			Company size (number of employees)			
						Primary	Secondary	Tertiary	0–9	10–49	50–249	250+
Number of trade unions	3	2	1	5	4	3	4	5	5	5	5	1
Number of Member States	3	2	1	5	4	3	4	5	5	5	5	1

Source: Network of Eurofound Correspondents, 2023.

Only in Greece is a trade union not affiliated to industriAll Europe the largest in the Member State (Oekide is also the only union active in the sector in this Member State) (see Table 37). One trade union ranks second (GPA in Austria), while the others rank third (Ledarna in Sweden), fourth (UGL Chimici in Italy) and fifth (CFE-GCG AGRO in France) in their countries.

Table 37: Overview of membership strength of the trade unions not represented on the tanning and leather ESSDC

	Total	Trend	Ranking across the entire tanning and leather sector
Number of trade unions	5	Increasing: 1 Stable: 1	Largest: 1 Second largest: 1
Number of Member States	5	Decreasing: 0 No data: 2	No data: 0
Member States with no trade unions	6 (BG, CZ, EE, LT, LV, PL)		

Note: Three trade unions rank third, fourth and fifth in the sector in their Member States.

Source: Network of Eurofound Correspondents, 2023.

Four of the five trade unions that are not affiliated to industriAll Europe participate in MEB (Table 38). The French union CFE-CGC AGRO also engages in single-employer bargaining. Two unions are involved in sectoral social dialogue: GPA and CFE-CGC AGRO. However, the assessment of their involvement in consultations with the government is hindered by widespread missing data.

**Table 38: Overview of the involvement in collective bargaining of the trade unions not represented on the tanning and leather ESSDC**

	Trade unions recognised as representative (national level)	MEB	SEB	Involved in social dialogue	Consulted by government	Involved in industrial action	National affiliation	European affiliation
<b>Number of trade unions</b>	5	4	1 (*)	2 (*)	2 (*)	1 (*)	5	0 (*)
<b>Number of Member States</b>	5	4	1	2	2	1	5	0
<b>Member States with no trade unions</b>	BG, CZ, EE, LT, LV, PL							

(\*) Widespread missing data. Data on involvement in SEB and social dialogue are missing for one trade union; data on consultations by governments are missing for three TUs; data on involvement in industrial action are missing for two TUs; data on European affiliation are missing for two trade unions.

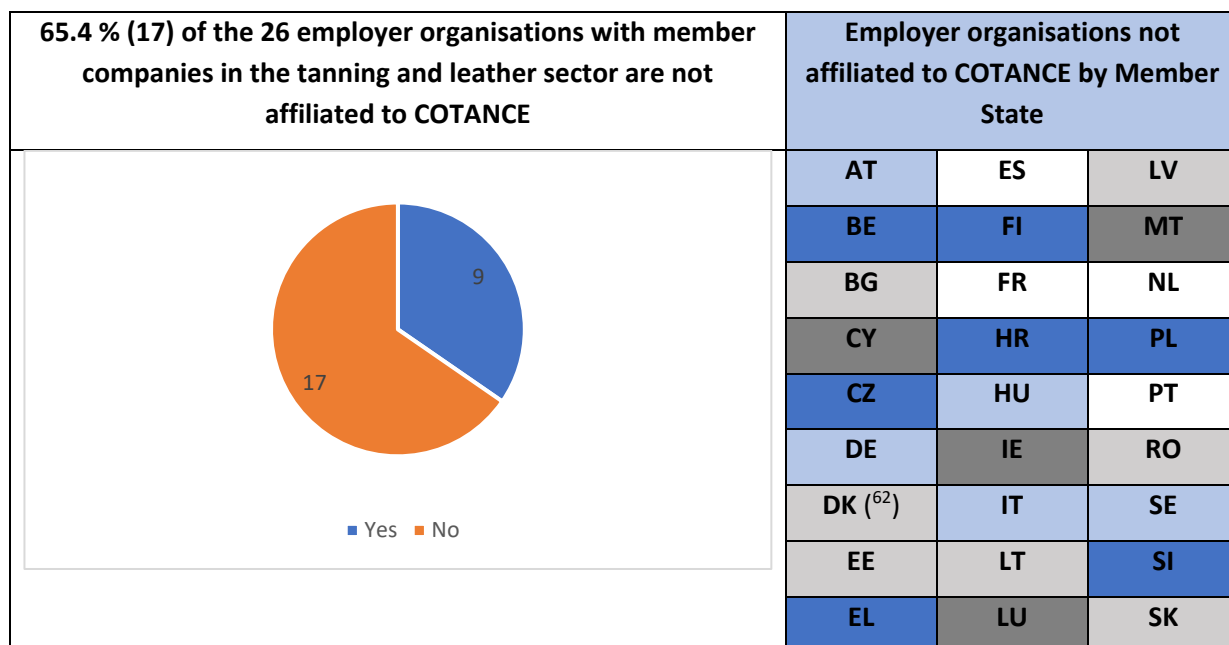
Source: Network of Eurofound Correspondents, 2023.

### 3.4. Employer organisations not represented on the tanning and leather ESSDC

In this section, the national sector-related employer organisations that are not affiliated to COTANCE are analysed, with data enabling the evaluation of potential limitations to COTANCE's representativeness. Seventeen sector-related employer organisations in 12 Member States are not members of COTANCE. They account for 65.4 % of all employer organisations active in the industry. In terms of workforce coverage, non-COTANCE-affiliated employer organisations cover 9.8 % of the total sectoral workforce.

In seven Member States, employer organisations are not affiliated to COTANCE. These are Belgium, Croatia, Czechia, Finland, Greece, Poland and Slovenia (Figure 7).

Figure 7: Share (and number) of employer organisations organising companies in the tanning and leather sector not represented on the tanning and leather ESSDC, EU-23



*Note:* Cells shaded in light blue indicate Member States with, in the tanning and leather sector, some employer organisations affiliated to COTANCE and some not affiliated to COTANCE; cells shaded in dark blue indicate Member States in which sectoral employer organisations are not represented by COTANCE; cells shaded in dark grey represent Member States in which there are no tanning and leather activities; cells shaded in light grey represent Member States in which there are tanning and leather activities but there are no employer organisations representing companies in the sector; and cells with no shading indicate Member States in which all sector-related employer organisations are affiliated to COTANCE.

*Source:* Based on data in Table 8 in Chapter 2.

In terms of sector-relatedness, three employer organisations cover all the tanning and leather subsectors (Leder cuir in Belgium, IKEM in Sweden and PIPS in Poland), while the remainder cover between one and six subsectors (Table 39). With the exception of Leder cuir and the Hellenic Tanners' Association in Greece, all employer organisations not affiliated to COTANCE also have member companies in other industrial sectors.

<sup>(62)</sup> With regard to Denmark, the employer organisation DI indicated to the Eurofound correspondent that it has no members in the tanning and leather sector (NACE 15.11). The company Scan-Hide, a COTANCE member, recorded activity in the sector in the past, but is currently active mainly in NACE 10.11 (slaughtering).

Table 39: Sector coverage of employer organisations not represented on the tanning and leather ESSDC, EU-23

Member State	Employer organisation	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities <sup>(63)</sup>	Other sectors covered	European affiliation
AT	BIMB	Yes	Yes	Yes	Yes			Yes	Parts of textile	None
BE	Leder cuir	Yes	Yes	Yes	Yes	Yes	Yes	Yes		n.d. <sup>(64)</sup>
CZ	ATOK <sup>(65)</sup>								Textile, commerce, education, research	Euratex
DE	ADL	Yes	Yes	Yes					n.d.	None
EL	Hellenic Tanners' Association	Yes	Yes	Yes		Yes	Yes	Yes		None
FI	AFLSI	Yes	Yes	Yes		Yes	Yes		Footwear	CEC
HR	HUP UTKI			Yes	Yes		Yes		Textile	Euratex, BusinessEurope
HU	BCE						Yes		Footwear	None

<sup>(63)</sup> Leather repair activities are not part of the tanning and leather sector in France, Hungary or Slovenia.

<sup>(64)</sup> The employer organisation BIMB did not provide information regarding its European affiliation.

<sup>(65)</sup> In Czechia, there is no employer organisation representing companies in the tanning sector. However, following the extension of a bargaining agreement for the broader NACE 15 (manufacture of leather and related products) sector, around 50 employees in the tanning sector are covered.

Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Employer organisation	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities <sup>(63)</sup>	Other sectors covered	European affiliation
IT	Unionchimica	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	Chemical, energy, plastic, rubber	CEA-PME
PL	PIPS	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Footwear, sector-related research institutes	CEC
	PGPO	Yes	Yes			Yes	Yes	Yes	Footwear, trade and e-commerce	None
	OIBS	Yes	Yes	Yes	Yes	Yes	Yes		Footwear, saddlery, glove and haberdashery, wholesalers of finished leather and leather products, trading and consulting	None
SE	IKEM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical, plastic, rubber, pharmaceuticals, refineries	None
	TEKO						Yes		Textile	Euratex

Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Employer organisation	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities <sup>(63)</sup>	Other sectors covered	European affiliation
SI	GZS-Ztoup	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Textile, paper, metal and non-metal processing	None
	ZDS		Yes				Yes		All sectors	None
	OPZ		Yes				Yes		Energy, construction, commerce, catering, paper and wood, chemical, metals, services, traffic and communication	None

Notes: Empty cells indicate no coverage. n.a. = not applicable; n.d. = no data.

Source: Network of Eurofound Correspondents, 2023.

Table 40 shows that 11 employer organisations that are not members of COTANCE represent small tanning and leather companies, 7 represent microenterprises and 6 represent medium-sized enterprises. Four organisations also cover self-employed tanners, while only two (ADL in Germany and HUP UTKI in Croatia) have large companies among their membership.

**Table 40: Categories of companies covered by sectoral employer organisations not represented on the tanning and leather ESSDC, EU-23**

	<b>Self-employed tanners</b>	<b>Microcompanies (0–9 employees)</b>	<b>Small companies (10–49 employees)</b>	<b>Medium-sized companies (50–249 employees)</b>	<b>Large companies (250+ employees)</b>
<b>Number of employer organisations</b>	4	7	11	6	2
<b>Number of Member States</b>	4	6	9	7	2

*Note:* Widespread missing data for all sizes of companies.

*Source:* Network of Eurofound Correspondents, 2023.

The membership strength and involvement in collective bargaining and social dialogue of the 17 employer organisations that are not affiliated to COTANCE are displayed in Tables 41 and 42. As can be seen from Table 41, 6 of the 17 employer organisations not affiliated to COTANCE are the largest in their Member State (Belgium, Croatia, Finland, Greece, Poland, Slovenia). An employer organisation is always considered the largest when no other COTANCE affiliates exist in a country. Six employer organisations that are not members of COTANCE are the second largest in their Member States. The membership of 8 of the 17 employer organisations is estimated to be stable.

Looking at Table 42, 12 employer organisations outside COTANCE's membership are recognised as representative in their Member States. Eight employer organisations participate in multi-employer bargaining, and one of them – namely the Finnish organisation AFLSI – also bargains at the company level. Seven are involved in social dialogue, and eight are regularly consulted by the government. Six employer organisations have a European affiliation other than COTANCE (see Section 3.5).

Table 41: Overview of membership strength of the employer organisations not represented on the tanning and leather ESSDC

	Total	Trend	Ranking across the entire tanning and leather sector
Number of employer organisations	17	Increasing: 1 Stable: 8	Largest: 6 Second largest: 6
Number of Member States	12	Decreasing: 3 No data: 5	No data: 3
Member States with no employer organisations	7 (BG, DK, EE, LT, LV, RO, SK)		

*Note:* Two more employer organisations rank third in their Member States.

*Source:* Network of Eurofound Correspondents, 2023.

Table 42: Overview of the involvement in collective bargaining of the employer organisations not represented on the tanning and leather ESSDC

	Employer organisations recognised as representative (national level)	MEB	SEB	Involved in social dialogue	Consulted by government	National affiliation	European affiliation
Number of employer organisations	12	8	1	7	8	14	6
Number of Member States	10	7	1	6	6	10	6
Member States with no employer organisations	BG, DK, EE, LT, LV, RO, SK						

*Source:* Network of Eurofound Correspondents, 2023.

### 3.5. Other European organisations with some sectoral national membership

The European trade unions EFFAT and UNI Europa also have members in the tanning and leather sector. The French trade union CFE-CGC AGRO covers workers in management positions not only in (five subsectors of) the tanning and leather sector but also in the agricultural and agri-food industries – two core sectors in which EFFAT represents workers in Europe (see Table 43). The Belgian union ACV-



BIE is affiliated to UNI Europa as well as industriAll Europe, and is therefore not mentioned here specifically.

Table 43: Other European organisations representing trade unions in the tanning and leather sector

Member State	Trade union	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities	Other sectors covered	European affiliation
FR	CFE-CGC AGRO	Yes	Yes	Yes		Yes	Yes		Agriculture, agri-food	EFFAT

Note: Empty cells indicate no coverage.

Source: Network of Eurofound Correspondents, 2023.

With regard to employers, the situation is more composite. Four European employer organisations have one or more members that are active in the tanning and leather sector. These are Euratex, CEC, BusinessEurope and CEA-PME (see Table 44). Three sector-related employer organisations are members of Euratex, namely ATOK in Czechia, HUP UTKI in Croatia and TEKÖ in Sweden. However, the case of the Czech organisation ATOK is special: it does not have members in the tanning and leather sector but is still included in this study because the extension of a collective bargaining agreement (of which the employer organisation is a co-signatory) for the broader NACE 15 sector to the tanning and leather sector has led to the inclusion of some 50 employees. CEC European Managers has two members in the tanning and leather sector (AFLSI in Finland and PIPS in Poland), while BusinessEurope and CEA-PME have one member each (HUP UTKI in Croatia and Unionchimica in Italy, respectively). Table 44 shows in more detail the parts of the tanning and leather sector that these EU-level organisations cover through their members in the sector.

Table 44: Other European organisations representing employer organisations with member companies in the tanning and leather sector

Member State	Employer organisation	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities <sup>(66)</sup>	Other sectors covered	European affiliation
<b>CZ</b>	ATOK <sup>(67)</sup>								Textile, commerce, education, research	Euratex
<b>FI</b>	AFLSI	Yes	Yes	Yes		Yes	Yes		Footwear	CEC
<b>HR</b>	HUP UTKI			Yes	Yes		Yes		Textile	Euratex, BusinessEurope
<b>IT</b>	Unionchimica	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	Chemical, energy, plastic, rubber	CEA-PME
<b>PL</b>	PIPS	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Footwear, sector-related research institutes	CEC
<b>SE</b>	TEKO						Yes		Textile	Euratex

Notes: Empty cells indicate no coverage. n.d. = no data.

Source: Network of Eurofound Correspondents, 2023.

<sup>(66)</sup> Leather repair activities are not part of the tanning and leather sector in France, Hungary or Slovenia.

<sup>(67)</sup> In Czechia, there is no employer organisation representing companies in the tanning sector. However, following the extension of a bargaining agreement for the broader NACE 15 (manufacture of leather and related products) sector, around 50 employees in the tanning sector are covered.

### 3.6. Capacities of industriAll Europe and COTANCE to represent member organisations and to negotiate

One of the European Commission's criteria for EU-level social partners to be consulted, as described in Commission Decision 98/500/EC, is that:

*they shall consist of organisations which are themselves an integral and recognized part of Member States' social partner structures and have the capacity to negotiate agreements, and which are representative of several Member States.*

(European Commission, 1998)

Based on Article 155 of the TFEU, European sectoral social partner organisations need to prove their capacity to negotiate on behalf of their members and to enter 'contractual relations, including agreements' – that is, they must have the capacity to commit themselves and their national affiliates. A European organisation has the capacity to negotiate such an agreement if it has received a mandate to do so from its affiliates, or if it can receive such a mandate in accordance with a given mandating procedure.

Eurofound has applied the criterion of the 'capacity to negotiate' to both the EU-level social partner associations and, in a bottom-up approach, the national organisations, in order to assess their relevance. The standard Eurofound methodology for assessing the criteria of being an 'integral part of Member State industrial relations' and the 'capacity to negotiate' considers the 'capacity to negotiate agreements' at both the EU and the national levels. The mandate or mandating procedure can be either **statutory** (i.e. set out in the constitution of the organisation or annexed to it) or **non-statutory** (i.e. set out in secondary documents, such as rules of procedure, memoranda of understanding or ad hoc decisions by the governing bodies of the organisation). Finally, in the absence of the above procedures, management and labour may have an **intrinsic capacity to negotiate** as proven by their practical involvement in matters such as binding agreements, declarations or joint opinions.

COTANCE, according to its statutes of 2022, represents the associations of tanners and dressers in the Member States or, in their absence, individual tanners, and is the authorised representative for all the issues of general interest to the industry in the institutions of the EU and other international bodies. However, it has no statutory negotiating mandate in matters of European social dialogue, as indicated in the previous representativeness study for the tanning and leather sector (Eurofound, 2017), COTANCE's relevant bodies, in particular its General Assembly, decide on a case-by-case basis whether to engage in negotiations at the European level and on the scope of the negotiating mandate. According to Article 16 of its statutes, the 'Assembly is the decision body of the Confederation', and, with the endorsement of all the organisations' members, joint texts and initiatives can be agreed. Therefore, COTANCE has a **non-statutory mandate**.

**industriAll Europe** promotes social dialogue at all levels in its statutes. It acts as an agenda setter within sectoral social dialogue and promotes joint strategies for the sustainable development of the textile, clothing, leather and footwear sectors, which are organised by one sectoral working group, in accordance with Article 29 and Appendix III of the industriAll Europe statutes (industriAll Europe, 2021). Aside from this, the involvement of industriAll Europe in European sectoral social dialogue is not explicitly mentioned in its statutes, but is clearly indicated by other documentation, including its

website <sup>(68)</sup>. On this basis, industriAll Europe is not equipped with an explicit permanent statutory mandate to negotiate on behalf of its members on matters relating to European social dialogue. Rather, Appendix II of industriAll Europe's statutes provides for detailed mandate procedures in relation to the nominations for ESSDCs in various sectors. The appendix also stipulates the procedures for deciding on platforms and agreeing on statements as part of sectoral social dialogue, obliging the ESSDC members to 'propose and prepare possible platforms and statements in close cooperation with the Secretariat [of industriAll Europe]'. In doing so, the 'members of the [ESSDC] shall act in line with the policies and procedures as agreed by the Executive Committee and Congress', the highest bodies within the European federation, in order to guarantee the participation of all national member unions in matters of European social dialogue. industriAll Europe therefore has a well-defined procedure for obtaining a mandate and getting European sectoral social dialogue texts approved by its member organisations. It has the capacity to negotiate binding agreements, such as the NEPSI agreement <sup>(69)</sup>, which, however, does not cover workers in the tanning and leather sector. No binding European sectoral social dialogue agreements have yet been reached specifically for the tanning and leather sector. Based on the above, the conclusion is that industriAll Europe has an **intrinsic capacity to negotiate**.

### 3.7. Effective participation in meetings of the tanning and leather ESSDC

In order to assess the effective participation of industriAll Europe and COTANCE in the tanning and leather ESSDC, the attendance of their members at meetings held during 2022, 2023 and 2024 was analysed. Three meetings were held per year (one jointly with the textile sector), either face to face or in a hybrid format.

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<sup>(68)</sup> See, for example, the web page on social dialogues (<https://news.industrial-europe.eu/p/social-dialogues>).

<sup>(69)</sup> This is the agreement on the protection of workers' health through the good handling and use of crystalline silica and products containing it.

Table 45: Effective participation in the tanning and leather ESSDC, EU-23, 2022–2024

	2022	2023	2024
Member States with trade unions participating in the tanning and leather ESSDC	8 Member States: AT, BE, ES, FI, FR, HU, IT, PT	9 Member States: AT, BE, BG <sup>(70)</sup> , DK, ES, FI, HU, IT, PT, SE	7 Member States: AT, BE, BG, DE, ES, HU, IT, PT
Member States where industriAll Europe has affiliates but they do not participate in the tanning and leather ESSDC	9 Member States: <b>CZ, DE, DK, HR, NL, RO, SE, SI, SK</b>	7 Member States: <b>CZ, DE, HR, NL, RO, SI, SK</b>	9 Member States: <b>DE, DK, FI, HR, NL, RO, SE, SI, SK</b>
Member States where COTANCE members have participated in the tanning and leather ESSDC	7 Member States: AT, DE, ES, FR, HU, IT, PT	7 Member States: AT, DE, ES, FR, HU, IT, PT	7 Member States: AT, DE, ES, FR, HU, IT, PT
Member States where COTANCE has companies affiliated but they do not participate in the tanning and leather ESSDC	2 Member States (not counting DK): <b>NL, SE</b>	2 Member States (not counting DK): <b>NL, SE</b>	2 Member States (not counting DK): <b>NL, SE</b>

*Notes:* industriAll Europe members from Denmark and Sweden only attended the textiles, clothing, leather and footwear meeting. The COTANCE member from Austria only attended that meeting. Red font indicates Member States from which delegates did not attend some tanning and leather ESSDC meetings between 2022 and 2024, despite being affiliated to a European social partner organisation participating in the tanning and leather ESSDC; bold font indicates Member States from which delegates never attended tanning and leather ESSDC meetings between 2022 and 2024.

*Source:* Compiled using data from the European Commission's Directorate-General for Employment, Social Affairs and Inclusion.

Table 45 shows that, between 2022 and 2024, trade unions affiliated to industriAll Europe from up to nine Member States were represented on the tanning and leather ESSDC (and the textiles, clothing, leather and footwear ESSDC). industriAll Europe members from six Member States (Croatia, Czechia, Netherlands, Romania, Slovenia and Slovakia) did not attend any of the ESSDC meetings over this period. With regard to employers, representative organisations from seven Member States participated in all tanning and leather (and textiles, clothing, leather and footwear) ESSDC meetings between 2022 and 2024. Members from two countries (the Netherlands and Sweden) did not attend any meetings during this period.

Representatives from Austria, France, Germany, Hungary, Italy and Portugal also participated in a joint project (Green Deal leather) between 2022 and 2024.

The situations of each European social partner in the tanning and leather sector – regarding their sector-relatedness, their role in the Member States' social partnership structures, their capacity to negotiate agreements on behalf of their members and their structures to ensure effective participation in the work of the tanning and leather ESSDC – are summarised in Table 46.

<sup>(70)</sup> As mentioned above, the Bulgarian trade union has members not in the tanning and leather sector but in the textile sector; as a result, it sometimes participates in the tanning and leather ESSDC, but is not included in this table when counting the number of Member States represented in meetings.

Table 46: Comparative overview of the social partners in the tanning and leather sector based on Commission Decision 98/500/EC criteria

Criterion	industriAll Europe	COTANCE	Trade unions not on the tanning and leather ESSDC	Employer organisations not on the tanning and leather ESSDC
Sector-relatedness	30 out of 35	9 out of 26	5 out of 35	17 out of 26
Coverage of Member States	17 out of 23	9 out of 23	5 out of 23	12 out of 23
Capacity to negotiate	Intrinsic capacity to negotiate	Non-statutory mandate with decisions made by assembly on a case-by-case basis	n.a.	n.a.
Adequate structures	Up to 9 Member States have been represented in the tanning and leather (and the textiles, clothing, leather and footwear) ESSDC out of the 17 Member States where industriAll Europe has affiliates	7 Member States out of the 9 where COTANCE had members represented the organisation in the ESSDC between 2022 and 2024	n.a.	n.a.

Note: n.a. = not applicable.

## Conclusions

In 2022, there were nearly 2 850 companies employing around 40 000 workers in the European tanning and leather industry, as captured by Eurostat's SBS in the 23 Member States included in this study. No significant tanning and leather activities can be found in Cyprus, Ireland, Luxembourg or Malta; therefore, these Member States have not been covered in this report. The research identified 35 trade unions and 26 employer organisations active at the national level in the tanning and leather sector. No sectoral trade unions exist in 5 of the 23 Member States included in the study, namely Bulgaria, Estonia, Latvia, Lithuania and Poland. With regard to employers, 7 of the 23 Member States have no employer organisations active in the tanning and leather sector (Bulgaria, Denmark, Estonia, Latvia, Lithuania, Romania and Slovakia).

Of the 35 trade unions active in the tanning and leather industry (see Chapter 2), 30 organisations in 17 Member States are affiliated to industriAll Europe. This means that 86 % of all sector-related worker organisations are members of industriAll Europe. industriAll Europe has members in the tanning and leather sector in all the Member States where labour is organised in the industry except Greece, where the only trade union active in the industry is not affiliated to industriAll Europe or any other EU-level organisation. In terms of parts of the sector covered by industriAll Europe affiliates, in nine cases – namely unions active in Austria, Belgium, Italy and Sweden – the sector-related unions cover all parts of the industry and other sectors, for example the chemical industry and the textile sector. These cases demonstrate sectoral overlap. In another 18 cases, the sectoral unions cover only some parts of the tanning and leather sector while also representing workers in other industries, and therefore exhibit sectional overlap. In 16 of the 17 Member States with sector-related trade unions, the largest trade union at the national level is a member of industriAll Europe. In six countries, the second largest is an industriAll Europe affiliate. Adding up membership data for the countries where these are available, the unions that are members of industriAll Europe represent 10 % of workers in the sector. Among the members of industriAll Europe, 23 trade unions in 11 Member States (all but Croatia, Hungary, the Netherlands, Romania and Slovakia) engage in collective bargaining at the sectoral level, while 19 engage in SEB: 3 in SEB only (SIND TOKG in Croatia, BDSZ in Hungary and Confpeltex in Romania) and 16 in both multi- and single-employer bargaining. Collective bargaining coverage related to negotiations in which industriAll Europe member unions participate is between 90 % and 100 % in nine Member States (Belgium, Denmark, Finland, France, Germany, Italy, Portugal, Slovenia and Sweden) and over 60 % in two other countries (Austria and Hungary).

In terms of future capacity building, the European trade union EFFAT is the only EU-level labour organisation with a member in the tanning and leather sector (where there is no joint affiliation with industriAll Europe). This member is the French trade union CFE-CGC AGRO, which covers workers in management positions not only in (five subsectors of) the tanning and leather sector but also in the agricultural and agri-food industries, which are two core sectors in which EFFAT represents workers in Europe.

Based on the findings documented in this study, as summarised in Table 46, it can be concluded that **industriAll Europe is the most representative** European trade union organisation in the tanning and leather sector.

Within the geographical and sectoral scope of this study, COTANCE counts nine member organisations in nine Member States. Two more employer organisations are part of COTANCE but are not included in this study: the Danish company Scan-Hide, which is excluded because it falls under a different NACE

code, and the employer organisation Leather UK, which falls outside the geographical scope of this study. Four employer organisations affiliated to COTANCE (Acexpiel in Spain, UNIC in Italy, FNL in the Netherlands and SG in Sweden) cover the tanning and leather sector only. The five remaining organisations cover some parts of the tanning and leather sector, and other sectors in industries such as footwear, textiles and chemicals.

Most COTANCE member organisations (eight out of nine) represent small companies, with between 10 and 49 employees. Five COTANCE affiliates cover microenterprises (with fewer than nine employees), while six and four represent medium-sized and large companies, respectively. Data on the employment density of the national member organisations of COTANCE are available for six Member States, with the density ranging from 2.8 % in Hungary to 92.9 % in France.

All COTANCE-affiliated members are considered representative organisations in their national industrial relations systems, except for the German organisation VDL, which is a business association and does not take part in collective bargaining, and therefore does not need to fulfil any criteria to be recognised as a collective bargaining partner. Yet VDL participates in nationwide industry dialogue for the leather industry, together with its partner organisation ADL (which engages in collective bargaining; see Section 3.3). Six COTANCE members take part in MEB (FV TBSL in Austria, Acexpiel in Spain, FFTM in France, UNIC in Italy, APICCAPS in Portugal and SG in Sweden). Six employer organisations are consulted by the government (all but VDL in Germany, MGSK in Hungary and FNL in the Netherlands), and seven are involved in sectoral social dialogue (all except FNL and SG).

Based on the findings documented in this study, as summarised in Table 46, it can be concluded that **COTANCE is the most representative** European employer organisation in the tanning and leather sector.



## References

All Eurofound publications are available at [www.eurofound.europa.eu](http://www.eurofound.europa.eu)

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## Annex

Table 47: Distribution of companies in the sector by size (number of employees) and Member State (NACE 15.1)

Member State	NACE 15.1 (15.11)	0–9	10–19	20–49	50–249	250+
AT	179 (30)	169	4	2	1	3
BE	71 (13)	69	n.d.	0	n.d.	0
BG	130 (22)	106	10	n.d.	9	n.d.
CZ	386 (98)	343	20	15	6	2
DE	42 (4)	41	1	0	0	0
DK	939 (83)	826	58	38	13	4
EE	60 (7)	55	3	1	1	0
EL	260 (72)	247	6	4	3	0
ES	1 177 (230) (*)	1 006 (*)	82 (*)	n.d.	33 (*)	n.d.
FI	199 (34)	195	n.d.	n.d.	n.d.	0
FR	3 993 (85)	3 860	40	39	33	21
HR	n.d. (65) (**)	40 (**)	15 (**) <sup>(71)</sup>	0	8 (**)	2 (**)
HU	350 (20)	328	10	3	5	4
IT	6 437 (1 619)	4 971	803	469	172	22
LT	251 (8)	240	7	4	0	0
LV	73 (9)	72	1	0	0	0
NL	627 (39)	608	14	2	2	1
PL	1 104 (145)	976	70	47	10	1
PT	368 (91)	307	25	19	13	4
RO	504 (72)	425	22	26	27	4
SE	402 (29)	392	1	7	2	0
SI	76 (8)	72	1	1	0	2
SK	127 (64)	120	n.d.	3	n.d.	n.d.

(\*) Data from Eurostat's SBS for 2021 (latest year with data available).

(\*\*) Data from the Network of Eurofound Correspondents.

Note: n.d. = no data.

<sup>(71)</sup> This figure includes companies with 10–19 and 20–49 employees.

Table 48: Sector coverage of trade unions in the sector by Member State

Member State	Trade union	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities	Other sectors covered	European affiliation
AT	PROGE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Blue-collar workers, apprentices and retirees in the private sector in metalworking, mining, energy, textile, agriculture, food processing, tobacco, chemical, glass production, paper, vulcanisation, mineral oil, gas and TAW	industriAll Europe
	GPA	Yes	Yes	Yes	Yes	Yes	Yes	Yes	White-collar workers in almost all sectors	n.d. <sup>(72)</sup>
BE	ACV-BIE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Construction, energy, industrial sectors	industriAll Europe, EFBH, UNI Europa
	ACLVB-CGSLB	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Almost all sectors	industriAll Europe
	ABVV-FGTB ACCG	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Mainly production and industrial sectors	industriAll Europe
BG	None									

<sup>(72)</sup> The trade union GPA did not provide information regarding its European affiliation.

## Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities	Other sectors covered	European affiliation
CZ	OS TOK <sup>(73)</sup>								Footwear, textile	industriAll Europe
DE	IG BCE	Yes	Yes				Yes		Mining; chemical; pharmaceuticals; synthetic fibres; energy; glass; rubber, ceramics; plastics processing; leather; mineral oil; paper and pulp production, renovation and disposal	industriAll Europe
DK <sup>(74)</sup>	3F				Yes		Yes	Yes	Blue-collar workers in both the private and the public sectors	industriAll Europe <sup>(75)</sup>
	CO-industri				Yes		Yes	Yes	Entire manufacturing sector	industriAll Europe
EE	None									
EL	Oekide	Yes	Yes	Yes	Yes	Yes	Yes		Textile	None
	CCOO-Industria	Yes	Yes	Yes	Yes	Yes	Yes		Textile and other industrial sectors	industriAll Europe

<sup>(73)</sup> Despite having no members in the sector, this union is included as a signatory of a broader collective agreement covering some workers in the tanning and leather sector and as a member of industriAll.

<sup>(74)</sup> Denmark's only tannery (Scan-Hide) is included under a different NACE code, and the few other companies in the sector work mainly with fur; hence, NACE 15.11 mostly includes fur-related activities in the country.

<sup>(75)</sup> The trade union 3F is indirectly affiliated to industriAll through its affiliation to CO-industri, which is a member of industriAll.

## Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities	Other sectors covered	European affiliation
ES <sup>(76)</sup>	UGT-FICA	Yes	Yes	Yes	Yes	Yes	Yes		Agri-food, capital goods and ICT, construction and mining, energy and water, automotive, chemical, textile and graphic arts, iron and steel	industriAll Europe
FI	Teollisuusliitto RY	Yes	Yes	Yes	Yes	Yes	Yes		Textile, chemical, technology, wood products	industriAll Europe
FR	CGT-THCB	Yes	Yes	Yes					Textile, clothing, industrial laundry	industriAll Europe
	FS-CFDT	Yes	Yes	Yes		Yes	Yes		Retail, accommodation, catering, tourism, cleaning, nursery assistants, personal services, safety and accident prevention, non-profit organisations, legal professions, real estate, textile, temporary work, consular chambers (chambers of commerce and industry, chambers of trade and crafts), employees of private employers	industriAll Europe

<sup>(76)</sup> Both Spanish trade unions are affiliated to industriAll Europe; however, the national correspondent was unsure if they were affiliated for the tanning and leather sector specifically, because the trade unions did not respond to their queries.

Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities	Other sectors covered	European affiliation
	FO Chimie	Yes	Yes	Yes		Yes	Yes		Commerce, hospitality, services and other sectors.	industriAll Europe
	CFTC-CMTE	Yes	Yes	Yes		Yes	Yes		Metal, energy, textile	industriAll Europe
	CFE-CGC AGRO	Yes	Yes	Yes		Yes	Yes		Agriculture, agri-food	EFFAT
HR	SIND TOKG	Yes	Yes	Yes					Textile, rubber	industriAll Europe
HU	BDSZ			Yes			Yes		Textile, garment, miners, energy	industriAll Europe
IT	Filctem CGIL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical, energy, textile	industriAll Europe
	FEMCA CISL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical, energy, textile	industriAll Europe
	Uiltec UIL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical, energy, textile	industriAll Europe
	UGL Chimici	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical	
LT	None									
LV	None									

## Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities	Other sectors covered	European affiliation
NL	FNV		Yes						All sectors	industriAll Europe
	CNV	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	All sectors	industriAll Europe
PL	None									
PT	Fesete	Yes	Yes	Yes	Yes	Yes	Yes		Textile, clothing, footwear and related sectors	industriAll Europe
	SIMA	Yes	Yes	Yes	Yes	Yes	Yes		Chemical, energy, textile	industriAll Europe
	Sindeq <sup>(77)</sup>								Chemical, energy	industriAll
RO	Confpeltex	Yes	Yes	Yes		Yes	Yes		Chemical, energy	industriAll Europe
SE	Unionen	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical, energy, textile	industriAll Europe
	IF Metall	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical, energy	industriAll Europe
	Ledarna	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical	None

<sup>(77)</sup> The trade union Sindeq does not have members in the sector; hence, it has no specific coverage of the sector. The trade union was included in the table because it co-signed a collective bargaining agreement (as a member of the federation Feticeq), in 2003, when it may have had members in the sector. The agreement is still valid.

## Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities	Other sectors covered	European affiliation
SI	ZSSS-Stupis		Yes				Yes		Chemical, energy	industriAll Europe
SK	IOZ	Yes	Yes	Yes					Chemical, energy, textile	industriAll Europe

*Notes:* Empty cells indicate no coverage. n.d. = no data.

*Source:* Network of Eurofound Correspondents, 2023.



Table 49: Categories of workers covered by sectoral trade unions by Member State

Member State	Trade union	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Education level			Company size (number of employees)				Ranking in the sector	European affiliation
							Primary	Secondary	Tertiary	0-9	10-49	50-249	250+		
AT	PROGE	Yes					Yes	Yes	Yes	Yes	Yes	Yes	Yes	Largest	industriAll Europe
	GPA	Yes	Yes		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Second largest	
BE	ACV-BIE	Yes				Yes	Yes	Yes	Yes	Yes	Yes	Yes		Second largest	industriAll Europe, EFBH, UNI Europa
	ACLVB-CGSLB	Yes				Yes	Yes	Yes	Yes	Yes	Yes	Yes		Smallest	industriAll Europe
	ABVV-FGTB ACCG	Yes				Yes	Yes	Yes	Yes	Yes	Yes	Yes		Largest	industriAll Europe
BG	None														
CZ	OS TOK														industriAll Europe
DE	IG BCE	Yes				Yes	Yes	Yes	Yes		Yes	Yes	Yes	Largest	industriAll Europe

## Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Education level			Company size (number of employees)				Ranking in the sector	European affiliation
							Primary	Secondary	Tertiary	0–9	10–49	50–249	250+		
DK	3F	Yes					Yes			Yes				Largest	industriAll Europe
	CO-industri	Yes					Yes			Yes				Negotiating association	industriAll Europe
EE	None														
EL	Oekide	Yes			Yes (up to production supervisor; no CEOs)	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Largest	
ES <sup>(78)</sup>	CCOO-Industria	Yes			Yes (up to middle-level management)	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Unclear which is largest; both are equally important	industriAll Europe
	UGT-FICA	Yes			Yes (up to middle-level)	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Unclear which is largest; both	industriAll Europe

<sup>(78)</sup> The national correspondent could not rank the Spanish trade unions according to their relative size, as no data regarding union membership were provided.

## Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Education level			Company size (number of employees)				Ranking in the sector	European affiliation
							Primary	Secondary	Tertiary	0-9	10-49	50-249	250+		
					management)									are equally important	
FI	Teollisuusliittot RY	Yes					Yes	Yes		Yes	Yes	Yes	Yes	Largest	industriAll Europe
FR	CGT-THCB	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Largest	industriAll Europe
	FS-CFDT	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Second largest	industriAll
	FO Chimie	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Third largest	industriAll Europe
	CFTC-CMTE	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes		Fourth largest	industriAll Europe
	CFE-CGC AGRO				Yes	Yes		Yes	Yes	Yes	Yes	Yes		Smallest	EFFAT
HR	SIND TOKG	Yes				Yes	Yes	Yes	Yes			Yes	Yes	Largest	industriAll Europe
HU	BDSZ	Yes			Yes	Yes	Yes	Yes	Yes				Yes	Largest	industriAll Europe

## Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Education level			Company size (number of employees)				Ranking in the sector	European affiliation
							Primary	Secondary	Tertiary	0–9	10–49	50–249	250+		
IT	Filctem CGIL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Largest	industriAll Europe
	FEMCA CISL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Second or third largest	industriAll Europe
	Uiltec UIL	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Second or third largest	industriAll Europe
	UGL Chimici	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	n.d.	
LT	None														
LV	None														
NL	FNV	Yes	Yes	Yes	Yes	Yes	n.d.	n.d.	n.d.	Yes	Yes			Largest	industriAll Europe
	CNV	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes			Second largest	industriAll Europe
PL	None														
PT	Fesete	Yes				Yes	Yes	Yes		Yes	Yes	Yes	Yes	Largest	industriAll Europe

# Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	Employees	Self-employed	Owners of their own businesses with employees	Management staff	Other staff in the sector	Education level			Company size (number of employees)				Ranking in the sector	European affiliation
							Primary	Secondary	Tertiary	0–9	10–49	50–249	250+		
	SIMA	Yes	Yes		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Second largest	industriAll Europe
	Sindeq <sup>(79)</sup>														industriAll Europe
RO	Confpeltex	Yes			Yes	Yes		Yes		Yes	Yes	Yes		Largest	industriAll Europe
SE	Unionen	Yes	Yes		Yes	Yes		Yes	Yes	Yes	Yes			Second largest	industriAll Europe
	IF Metall	Yes					Yes	Yes		Yes	Yes			Largest	industriAll Europe
	Ledarna				Yes				Yes	Yes	Yes	Yes		Smallest	
SI	ZSSS-Stupis	Yes			Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Largest	industriAll Europe
SK	IOZ	Yes						Yes				Yes		Largest	industriAll Europe

Notes: Empty cells indicate no coverage. CEO = chief executive officer; n.d. = no data.

Source: Network of Eurofound Correspondents, 2023.

<sup>(79)</sup> The Portuguese trade union Sindeq has no members in the tanning and leather sector but is included because it is a co-signatory of a collective agreement that applies to the sector.



Table 50: Involvement of sectoral trade unions in collective bargaining by Member State

Member State	Trade union	MEB	SEB	Workforce coverage (%)	Parts not covered
AT	PROGE	Yes	No	Approximately 60	None
	GPA	Yes	No	Estimated 40	None
BE	ACV-BIE	Yes	Yes	96–100	None
	ACLVB-CGSLB	Yes	Yes	96–100	None
	ABVV-FGTB ACCG	Yes	Yes	96–100	None
BG	None				
CZ	OS TOK	Yes		24	None
DE	IG BCE	Yes	No	90	Manufacture of various types of leather, processing of precious fur, trading of hides and skins, leather repair activities
DK	3F	Yes <sup>(80)</sup>	No	n.d. (estimated close to 100)	Processing of raw hides and skins, tanning of leather, manufacture of various types of leather, trading of hides and skins
	CO-industri	Yes	No	n.d. (estimated close to 100)	Processing of raw hides and skins, tanning of leather, manufacture of various types of leather, trading of hides and skins

<sup>(80)</sup> 3F is represented by CO-industri in all collective bargaining, as CO-industri is a negotiating/bargaining association of trade unions.

Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	MEB	SEB	Workforce coverage (%)	Parts not covered
EE	None				
EL	Oekide	No	No	n.a.	n.a.
ES	CCOO-Industria	Yes	Yes	100	Leather repair activities
	UGT-FICA	Yes	Yes	100	Leather repair activities
FI	Teollisuusliitto RY	Yes	Yes	92	Leather repair activities
FR	CGT-THCB	Yes	Yes	100	Processing of precious fur, trading of hides and skins
	FS-CFDT	Yes	Yes	100	Processing of precious fur, trading of hides and skins
	FO Chimie	Yes	Yes	100	Processing of precious fur, trading of hides and skins
	CFTC-CMTE	Yes	Yes	100	Processing of precious fur, trading of hides and skins
	CFE-CGC AGRO	Yes	Yes	100	Processing of precious fur, trading of hides and skins
HR	SIND TOKG	No	Yes	8–10	Processing of precious fur, trading of hides and skins, manufacture of finished leather goods, leather repair activities
HU	BDSZ	No	Yes	60	Processing of raw hides and skins, tanning of leather, processing of precious fur, trading of hides and skins, leather repair activities



# Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	MEB	SEB	Workforce coverage (%)	Parts not covered
IT	Filctem CGIL	Yes	Yes	Approximately 100	None
	FEMCA CISL	Yes	Yes	Approximately 100	None
	Uiltec UIL	Yes	Yes	Approximately 100	None
	UGL Chimici	Yes <sup>(81)</sup>	n.d.	n.d.	n.d.
LT	None				
LV	None				
NL	FNV	No	No	0	n.d.
	CNV	No	No	0	n.d.
PL	None				
PT	Fesete	Yes	No	100	Trading of hides and skins, manufacture of finished leather goods, leather repair activities
	SIMA	No	No	0	n.d.

<sup>(81)</sup> UGL Chimici co-signed the MEB agreement (based on data from the Italian registry of collective bargaining agreements of the National Council for Economics and Labour), but no information is available on the implications of this signature.

## Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Trade union	MEB	SEB	Workforce coverage (%)	Parts not covered
	Sindeq	Yes <sup>(82)</sup>	No	3	Manufacture of finished leather goods, leather repair activities
<b>RO</b>	Confpeltex	No	Yes	Estimated below 0.5	Processing of precious fur, leather repair activities
<b>SE</b>	Unionen	Yes	Yes	80–90	None
	IF Metall	Yes	No	80–90	None
	Ledarna	Yes	No	n.d.	n.d.
<b>SI</b>	ZSSS-Stupis	Yes	Yes	100	Processing of raw hides and skins, processing of precious fur, leather repair activities
<b>SK</b>	IOZ	No	Yes	17	Processing of precious fur, trading of hides and skins, manufacture of finished leather goods, leather repair activities

Notes: n.a. = not applicable; n.d. = no data.

Source: Network of Eurofound Correspondents, 2023.

<sup>(82)</sup> Sindeq does not have members in the tanning and leather sector but is included because it is a co-signatory of a collective bargaining agreement applying to the sector (as a member of the federation Feticeq).

Table 51: Sector coverage of employer organisations by Member State

Member State	Employer organisation	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities <sup>(83)</sup>	Other sectors covered	European affiliation
AT	FV TBSL	Yes	Yes	Yes	Yes				Textile, clothing	COTANCE
	BIMB	Yes	Yes	Yes	Yes			Yes	Parts of textile	None
BE	Leder cuir	Yes	Yes	Yes	Yes	Yes	Yes	Yes		n.d. <sup>(84)</sup>
BG	None									
CZ	ATOK <sup>(85)</sup>								Textile, commerce, education, research	Euratex
DE	VDL	Yes	Yes	Yes		Yes	Yes		Chemical, footwear, retail	COTANCE
	ADL	Yes	Yes	Yes					n.d.	None
DK	None									

<sup>(83)</sup> Leather repair activities are not part of the tanning and leather sector in France, Hungary or Slovenia.

<sup>(84)</sup> The employer organisation BIMB did not provide information regarding its European affiliation.

<sup>(85)</sup> In Czechia, there is no employer organisation representing companies in the tanning sector. However, following the extension of a bargaining agreement for the broader NACE 15 (manufacture of leather and related products) sector, around 50 employees in the tanning sector are covered.

Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Employer organisation	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities <sup>(83)</sup>	Other sectors covered	European affiliation
EE	None									
EL	Hellenic Tanners' Association	Yes	Yes	Yes		Yes	Yes	Yes		None
ES	Acexpiel	Yes	Yes	Yes	Yes	Yes				COTANCE
FI	AFLSI	Yes	Yes	Yes		Yes	Yes		Footwear	CEC
FR	FFTM	Yes	Yes	Yes					Traders, brokers in tanning	COTANCE
HR	HUP UTKI			Yes	Yes		Yes		Textile	Euratex, BusinessEurope
HU	MKSZ						Yes		Footwear, textile, garments	COTANCE, CEC
	BCE						Yes		Footwear	None
IT	UNIC	Yes	Yes	Yes	Yes	Yes	Yes	Yes		COTANCE
	Unionchimica	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.	Chemical, energy, plastic, rubber	CEA-PME
LT	None									

Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Employer organisation	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities <sup>(83)</sup>	Other sectors covered	European affiliation
LV	None									
NL	FNL	Yes	Yes	Yes						COTANCE
PL	PIPS	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Footwear, sector-related research institutes	CEC
	PGPO	Yes	Yes			Yes	Yes	Yes	Footwear, trade and e-commerce	None
	OIBS	Yes	Yes	Yes	Yes	Yes	Yes		Footwear, saddlery, glove and haberdashery, wholesale of finished leather and leather products, trading and consulting	None
PT	APICCAPS	Yes	Yes	Yes					Wholesale of leather, wholesale of chemical products	COTANCE

Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Employer organisation	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities <sup>(83)</sup>	Other sectors covered	European affiliation
RO	None									
SE	IKEM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Chemical, plastic, rubber, pharmaceuticals, refineries	None
	TEKO						Yes		Textile	Euratex
	SG	Yes	Yes	Yes	Yes	Yes	Yes	Yes		COTANCE
SI	GZS-Ztoup	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	Textile, paper, metal and non-metal processing	None
	ZDS		Yes				Yes		All sectors	None
	OPZ		Yes				Yes		Energy, construction, commerce, catering, paper and wood, chemical, metals, services, traffic and communication	None

## Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Employer organisation	Processing of raw hides and skins	Tanning of leather	Manufacture of various types of leather	Processing of precious fur	Trading of hides and skins	Manufacture of finished leather goods	Leather repair activities <sup>(83)</sup>	Other sectors covered	European affiliation
SK	None									

Notes: Empty cells indicate no coverage. n.a. = not applicable; n.d. = no data.

Source: Network of Eurofound Correspondents, 2023.

Table 52: Categories of companies covered by sectoral employer organisations by Member State

Member State	Employer organisation	Self-employed tanners	Microcompanies (0–9 employees)	Small companies (10–49 employees)	Medium-sized companies (50–249 employees)	Large companies (250+ employees)	European affiliation
AT	FV TBSL					Yes	COTANCE
	BIMB	Yes	Yes	Yes	n.d.		None
BE	Ledercuir	n.d.	n.d.	n.d.	n.d.	n.d.	n.d. <sup>(86)</sup>
BG	None						
CZ	ATOK	n.a.	n.a.	n.a.	n.a.	n.a.	Euratex
DE	VDL	n.d.	Yes	Yes	Yes	Yes	COTANCE
	ADL	n.d.	Yes	Yes	Yes	Yes	None
DK	None						
EE	None						
EL	Hellenic Tanners' Association	Yes	Yes	Yes	Yes		None
ES	Acexpiel	Yes	Yes	Yes	Yes		COTANCE

<sup>(86)</sup> Ledercuir did not provide information about its European affiliation.



Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Employer organisation	Self-employed tanners	Microcompanies (0–9 employees)	Small companies (10–49 employees)	Medium-sized companies (50–249 employees)	Large companies (250+ employees)	European affiliation
FI	AFLSI		Yes	Yes	Yes		None
FR	FFTM	Yes	Yes	Yes	Yes		COTANCE
HR	HUP UTKI			Yes	Yes	Yes	Euratex, BusinessEurope
HU	MKSZ		n.d.	n.d.	n.d.	n.d.	COTANCE
	BCE			Yes			None
IT	UNIC <sup>(87)</sup>			Yes	Yes	Yes	COTANCE
	Unionchimica	n.d.	n.d.	n.d.	n.d.	n.d.	CEA-PME
LT	None						
LV	None						
NL	FNL		Yes	Yes			COTANCE
PL	PIPS			Yes	Yes		CEC

<sup>(87)</sup> UNIC did not provide information about the size of its member companies. Yet other information provided by the employer organisation, such as its total membership and the total turnover of its members, along with information available on its website, allows us to estimate that the sizes of UNIC member companies range from medium to large.

Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Employer organisation	Self-employed tanners	Microcompanies (0–9 employees)	Small companies (10–49 employees)	Medium-sized companies (50–249 employees)	Large companies (250+ employees)	European affiliation
	PGPO		Yes	Yes			None
	OIBS	Yes	Yes	Yes			None
PT	APICCAPS		Yes	Yes	Yes	Yes	COTANCE
RO	None						
SE	IKEM			Yes	Yes		None
	TEKO						Euratex
	SG			Yes	Yes		COTANCE
SI	GZS-Ztoup	n.d.	n.d.	n.d.	n.d.	n.d.	None
	ZDS				Yes		None
	OPZ	Yes	Yes	Yes			None
SK	None						

Notes: Empty cells indicate no coverage. n.a. = not applicable; n.d. = no data.

Source: Network of Eurofound Correspondents, 2023.

Table 53: Involvement of sectoral employer organisations in collective bargaining by Member State

Member State	Employer organisation	Recognised as representative in the sector	MEB	SEB	Workforce coverage (%)	Parts not covered
AT	FV TBSL	Yes	Yes	No	Approximately 60	Trading of hides and skins, manufacture of finished leather goods, leather repair activities
	BIMB	Yes	Yes	No	Estimated 20 <sup>(88)</sup>	Trading of hides and skins, manufacture of finished leather goods
BE	Ledercuir	Yes	Yes	No	96	Trading of hides and skins
BG	None					
CZ	ATOK <sup>(89)</sup>	Yes	Yes	No	Estimated 20	None
DE	VDL	No <sup>(90)</sup>	No	No	—	—
	ADL	Yes	Yes	No	90	Processing of precious fur, trading of hides and skins, manufacture of finished leather goods, leather repair activities
DK	None					
EE	None					
EL	Hellenic Tanners' Association	Yes	No	No	—	—
ES	Acexpiel	Yes	Yes	No	100	Manufacture of finished leather goods, leather repair activities
FI	AFLSI	Yes	Yes	Yes	Estimated 92 <sup>(91)</sup>	Leather repair activities
FR	FFTM	Yes	Yes	No	100	Processing of precious fur, trading of hides and skins,

<sup>(88)</sup> No data are available about the actual workforce coverage of the bargaining agreement co-signed by BIMB. The figure reported here is the estimate of the organisation's employment density.

<sup>(89)</sup> In Czechia, there is no employer organisation representing companies in the tanning sector. However, following the extension of a bargaining agreement for the broader NACE 15 (manufacture of leather and related products) sector, around 50 employees in the tanning sector are covered.

<sup>(90)</sup> VDL is a business association and as such does not take part in collective bargaining. Therefore, it does not need to fulfil any criteria to be recognised as a collective bargaining partner.

<sup>(91)</sup> The estimate of the workforce covered includes both the shoe industry and the leather industry, as they have a common collective agreement.

## Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Employer organisation	Recognised as representative in the sector	MEB	SEB	Workforce coverage (%)	Parts not covered
						manufacture of finished leather goods, leather repair activities
HR	HUP UTKI	Yes	No	No	—	—
HU	MKSZ	Yes	No	No	—	—
	BCE	No <sup>(92)</sup>	No	No	—	—
IT	UNIC	Yes	Yes	No	Almost 100	None
	Unionchimica	n.d.	Yes	n.d.	n.d.	n.d.
LT	None					
LV	None					
NL	FNL	Yes	No	No	—	—
PL	PIPS	Yes	No	No	—	—
	PGPO	No <sup>(93)</sup>	No	No	—	—
	OIBS	No <sup>(94)</sup>	No	No	—	—
PT	APICCAPS	Yes	Yes	No	Approximately 84	Leather repair activities
RO	None					
SE	IKEM	Yes	Yes	No	80–90	None
	TEKO	Yes	Yes	No	n.d. <sup>(95)</sup>	n.d.
	SG	Yes	Yes	No	80–90	None
SI	GZS-Ztoup	Yes	Yes	No	100 <sup>(96)</sup>	Processing of raw hides and skins, processing of precious fur, leather repair activities

<sup>(92)</sup> The Hungarian organisation BCE is a business association and does not take part in collective bargaining. The national correspondent reports that it does not need to fulfil any criteria to be recognised as a collective bargaining partner.

<sup>(93)</sup> The Polish organisation PGPO is a business association and is not considered representative according to the legal criteria for representativeness in place in the country.

<sup>(94)</sup> The Polish organisation OIBS is a business association and is not considered representative according to the legal criteria for representativeness in place in the country.

<sup>(95)</sup> The employer organisation TEKÖ is not a signatory of the MEB agreement reported in the questionnaire, and we do not have information about other collective bargaining agreements of which it is a potential co-signatory.

<sup>(96)</sup> The employer organisation GZS only signed the tariffs annex of the collective bargaining agreement in 2022.

## Representativeness of the European social partner organisations: Tanning and leather sector

Member State	Employer organisation	Recognised as representative in the sector	MEB	SEB	Workforce coverage (%)	Parts not covered
	ZDS	Yes	Yes	No	100	Processing of raw hides and skins, processing of precious fur, leather repair activities
	OPZ <sup>(97)</sup>	No	No	No	—	—
SK	None					

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

*Source:* Network of Eurofound Correspondents, 2023.

<sup>(97)</sup> The Slovenian organisation OPZ is a business association that does not engage in social dialogue or collective bargaining and is therefore not considered representative.



Table 54: Full names and abbreviations of sectoral social partners

Member State	Abbreviation/ original name	Full name / English translation
AT	BIMB	Federal Association of Fashion and Textiles
	FV TBSL	Austrian Association of the Textile, Clothing, Shoe and Leather Industry
	GPA	Union of Salaried Employees
	PROGE	Production Trade Union
BE	ABVV-FGTB ACCG	General Labour Federation of Belgium
	ACLVB-CGSLB	General Federation of Liberal Trade Unions of Belgium
	ACV-BIE	ACV Construction Industry and Energy
	Ledercuir	Ledercuir
CZ	ATOK	Association of Textile, Clothing and Leather Industry
	OS TOK	Trade Union of Workers in Textile, Clothing and Leather Industry of Bohemia and Moravia
DE	ADL	Employers' Association of the German Leather Industry
	VDL	German Leather Federation
	IG BCE	Mining, Chemicals and Energy Industrial Union
DK	3F	Confederation of Danish Employers
	CO-industri	Central Organisation of Employees in Denmark
EL	Hellenic Tanners' Association	Hellenic Tanners' Association
	Oekide	Federation of Workers in the Textile, Clothing and Leather Industry

Representativeness of the European social partner organisations: Tanning and leather sector

<b>ES</b>	Acexpiel	Spanish Tanning Association
	CCOO-Industria	Trade Union Confederation of Workers' Commissions
	UGT-FICA	Industry Federation and Agricultural Workers of the General Workers' Confederation
<b>FI</b>	AFLSI	Association of Finnish Leather and Shoe Industry
	Teollisuusliitto	Industrial Union
<b>FR</b>	CFE-CGC AGRO	National Union of Agricultural Business Managers of the French Confederation of Professional and Managerial Staff – General Confederation of Professional and Managerial Staff
	CFTC-CMTE	Chemicals, Mining, Textiles and Energy Federation of the French Christian Workers' Confederation
	CGT-THCB	Textile, Clothing, Leather and Laundry Federation of the General Confederation of Labour
	FFTM	French Tanning Federation
	FO Chimie	Force Ouvrière – Chemical industries of the General Confederation of Labour
	FS-CFDT	Services Federation of the French Democratic Confederation of Labour
<b>HR</b>	HUP UTKI	Croatian Employers' Association of the Textile and Leather Industry
	SIND TOKG	Trade Union of Textile, Footwear, Leather and Rubber Sectors of Croatia
<b>HU</b>	BDSZ	Mining, Energy and Industry Workers' Trade Union Confederation
	MKSZ	Association of the Hungarian Light Industry
	BCE	Leather and Footwear Association
<b>IT</b>	FEMCA CISL	Federation of Energy, Fashion, Chemical and Related Sector Workers of the Italian Confederation of Workers' Unions
	Filctem CGIL	Italian Federation of the Chemical, Textile, Energy and Manufacturing Workers of the Italian General Confederation of Labour



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	UGL Chimici	National General Workers Union of the Chemical Industry
	Uiltec UIL	Italian Union of Textile, Energy and Chemical Workers
	UNIC	Italian Tanners' Association
	Unionchimica	Union of Chemical Workers
NL	CNV	Christian Trade Union Federation
	FNV	Netherlands Trade Union Confederation
	FNL	Federation of Dutch Leather Producers
PL	OIBS	Polish Chamber of the Leather Industry
	PGPO	Polish Group of Shoe Manufacturers
	PIPS	Polish Chamber of Shoe and Leather Industry
PT	APICCAPS	Portuguese Footwear, Components and Leather Goods Manufacturers' Association
	Fesete	Federation of Service Workers' and Technicians' Unions
	SIMA	Union of Metal and Allied Industries
	Sindeq	Democratic Union of Energy, Chemical, Textile and Other Industries
RO	Confpeltex	Light Industry Workers Federation
SE	IF Metall: Industrifacket Metall	Union of Metalworkers
	IKEM	Innovation and Chemical Industries in Sweden
	Ledarna	Swedish Managers' Association
	SG	Swedish Tanners
	TEKO	Sweden's Textile & Fashion Companies

Representativeness of the European social partner organisations: Tanning and leather sector

	Unionen	Union of White-collar Workers
<b>SI</b>	GZS-Ztoupj	Chamber of Commerce and Industry of Slovenia – Metals and Non-metals Association
	OPZ	Chamber of Craft and Small Business of Slovenia – Skin Processing Section
	ZSSS-Stupis	Slovenian Trade Union of Textile and Leather Processing Industries
	ZDS	Association of Employers of Slovenia
<b>SK</b>	IOZ	Integrated Trade Union Association

Table 55: Correspondents who contributed to this study

Member State	Correspondent	Organisation
AT	Georg Adam	Working Life Research Centre
BE	Dries Van Herreweghe	HIVA – Research Institute for Work and Society, KU Leuven
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CY	Alexandros Perdikes	Cyprus Labour Institute, Pancyprian Federation of Labour
CZ	Soňa Veverková	Research Institute for Labour and Social Affairs
DE	Sandra Vogel	German Economic Institute
	Thilo Janssen	Institute of Economic and Social Research, Hans Böckler Foundation
DK	Carsten Jørgensen	Employment Relations Research Centre, University of Copenhagen
	David Lausen	
EE	Ingel Kadarik	Praxis Centre for Policy Studies
	Miriam Lehari	
EL	Penny Georgiadou	Labour Institute of the Greek General Confederation of Labour
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FR	Frédéric Turlan	IR Share
HR	Predrag Bejaković	Faculty of Economics, Business and Tourism, University of Split
	Irena Klemenčić	Faculty of Law, University of Zagreb
HU	Szilvia Borbély	Kopint-Tárki Institute for Economic Research
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IT	Alessandro Smilari	Fondazione Giacomo Brodolini
	Silvio Bologna	
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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 tanning and leather sector. Their relative representativeness legitimises their right to be consulted 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 industriAll Europe, representing employees, and COTANCE, representing employers, as the most representative European-level social partner organisations in the tanning and leather sector.

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