

Industrial relations and social dialogue

Representativeness of the European social partner organisations: Agriculture sector



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Contents

Executive summary	1
Introduction	3
Sector factsheet	4
1. Sector overview	7
1.1. Scope and economic background of the agriculture sector	7
1.2. The agriculture workforce in the EU-27	9
1.3. Agriculture sector companies in the EU-27	14
1.4. National sectoral trade unions and employer organisations and their collective bargaining coverage ...	17
1.5. Changes in the national trade unions' and employers' landscape and in the representativeness of EFFAT and GEOPA-COPA	19
2. European sectoral social dialogue in the agriculture sector	22
3. EFFAT	24
3.1. Sector-relatedness of EFFAT member organisations in the agriculture sector	27
3.2. Role in the Member States' sectoral industrial relations landscape	29
3.3. Adequate structures to ensure effective participation of its members	36
3.4. Negotiation capacity of EFFAT	38
3.5. EFFAT members' effective participation in the ESSDC	39
4. GEOPA-COPA	41
4.1. Sector-relatedness of GEOPA-COPA member organisations in the agriculture sector	46
4.2. Role in the Member States' sectoral industrial relations landscape	48
4.3. Adequate structures to ensure effective participation of members	55
4.4. Negotiation capacity of GEOPA-COPA	56
4.5. GEOPA-COPA members' effective participation in the ESSDC	57
5. Social partner organisations not represented on the agriculture ESSDC	59
5.1. National sectoral trade unions not represented on the ESSDC	59
5.2. National sectoral employer organisations and business associations not represented on the ESSDC	61
6. Other European organisations	67
6.1. Other European trade union organisations	67
6.2. Other European employer organisations and business associations	67
7. Conclusions	72
References	75
Annex	77

List of tables

Table 1: Classification of activities in the agriculture sector based on NACE codes	7
Table 2: Regular agricultural labour force, by Member State, EU-27, 2020 and 2023	11
Table 3: Employment in the agriculture sector, by Member State, EU-27, 2023	13
Table 4: Comparative overview of national agriculture trade unions identified in 2015 and 2022	20
Table 5: Comparative overview of national agriculture employer organisations / business associations identified in 2015 and 2022	21
Table 6: Membership strength of sectoral trade unions affiliated to EFFAT, 2022	26
Table 7: Sector-relatedness of EFFAT members in terms of sector activities, 2022	27
Table 8: Types of workers organised by trade unions, 2022	28

Table 9: Number (and share) of agriculture trade unions affiliated to EFFAT with members in different company/farm size groups, 2022	29
Table 10: Trade unions involved in national social dialogue, 2022	31
Table 11: Trade unions' involvement in collective bargaining, 2022	32
Table 12: Trade unions' involvement in collective bargaining and coverage levels, 2022	33
Table 13: Representative status of EFFAT member organisations at the national level, 2022	36
Table 14: Involvement of sectoral trade unions in the EFFAT bodies, 2022	37
Table 15: Overview of EFFAT members' participation in agriculture ESSDC meetings between 2023 and 2025	40
Table 16: Membership strength of sectoral employer organisations affiliated to GEOPA-COPA, 2022	44
Table 17: Sector-relatedness of GEOPA-COPA members in terms of sector activities, 2022	46
Table 18: Number (and share) of agriculture employer organisations affiliated to GEOPA-COPA with members in different company/farm size groups, 2022	47
Table 19: Employer organisations involved in national social dialogue, 2022	49
Table 20: Employer organisations' involvement in collective bargaining, 2022	50
Table 21: Employer organisations' involvement in collective bargaining and coverage levels, 2022 ..	51
Table 22: Representative status of GEOPA-COPA member organisations at the national level, 2022 ..	55
Table 23: Involvement of sectoral employer organisations in the GEOPA-COPA bodies, 2022	55
Table 24: Overview of GEOPA-COPA members' participation in agriculture ESSDC meetings between 2023 and 2025	58
Table 25: Sector-relatedness of national trade unions not represented on the agriculture ESSDC in terms of sector activities, EU-27, 2022	59
Table 26: Membership strength of national trade unions not represented on the agriculture ESSDC, EU-27, 2022	60
Table 27: Sector-relatedness of employer organisations not represented on the agriculture ESSDC in terms of sector activities, EU-27, 2022	62
Table 28: Membership strength and collective bargaining involvement of national employer organisations not represented on the agriculture ESSDC, EU-27, 2022	63
Table 29: Other European organisations with affiliated agriculture-sector national employer organisations, EU-27, 2022	68
Table 30: Comparative overview of the social partners in the agriculture sector based on Commission Decision 98/500/EC criteria, 2022	74
Table 31: Classification of factors for the change in the number of national-level social partner organisations	77
Table 32: Largest employers in the agriculture sector in 2022	77
Table 33: Reasons for organisational fragmentation and pluralism among trade unions in the agriculture sector, 2022	81
Table 34: Reasons for organisational fragmentation among employer organisations in the agriculture sector, 2022	83
Table 35: Level of collective bargaining practices by Member State, 2022	86
Table 36: Coverage of national sectoral collective bargaining, 2022	86
Table 37: List of joint opinions of the agriculture ESSDC (since 1997) and of the Joint Committee on Social Problems of Agricultural Workers (between 1978 and 1997)	87
Table 38: List of national trade unions included in the study	91

Table 39: List of national employer organisations included in the study	95
Table 40: National correspondents who have contributed to this study	99

List of figures

Figure 1: Number of persons employed in the agriculture sector (regular agricultural labour force) by type of employment, EU-27, 2010–2020.....	10
Figure 2: Number of holdings in the agriculture sector, EU-27 and three select Member States, 2010–2020	14
Figure 3: Proportion of agricultural holdings by UAA, EU-27, 2020 (%)	15
Figure 4: Proportion of agricultural holdings by economic size of the farm (standard output in euro), EU-27, 2020.....	16
Figure 5: Share of farms and standard output as a proportion of the EU total, 2023 (%)	17
Figure 6: Number of national sectoral trade unions and employer organisations, 2022.....	18
Figure 7: Number of sectoral trade unions and employer organisations involved in collective bargaining, 2022	19
Figure 8: Scoreboard of the representativeness of EFFAT in the agriculture sector in the EU-27, 2022	24
Figure 9: Scoreboard of the representativeness of GEOPA-COPA in the agriculture sector in the EU-27, 2022	41

Country codes

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

Executive summary

Introduction

The aim of this study is to assess the representativeness of the European social partner organisations in the agriculture sector based on their capability to act and on the membership of the affiliated national organisations. This assessment enables the European Commission to decide which organisations should be retained in or added to the list of organisations entitled to consultation under Article 154 of the Treaty on the Functioning of the European Union. In the case of European social partner agreements, required to be implemented by means of a Council directive, as set out in Article 155 of the treaty, the regulatory powers granted to European social partners are based on their representativeness.

Policy context

Representativeness is defined by the European Commission decision of 20 May 1998 on the establishment of European sectoral social dialogue committees promoting the dialogue between the social partners at European level (Commission Decision 98/500/EC).

Key findings

- Agriculture is an **important sector for the EU economy**. The agriculture sector contributed **1.2 % to the EU's gross domestic product in 2024** – a share that has **not significantly changed for the past two decades**. The value of the output of EU agriculture was approximately EUR 532 billion in 2024. Half of this value originated from crop production and about two fifths from animal production. France, Germany, Italy and Spain contributed about 57 % of the EU's total agriculture output value. **The sector is declining in terms of numbers of both employees and farms/companies, while the utilised agricultural area has remained largely unchanged over the years**. This implies that farms have continued to increase in terms of size. Self-employment prevails in the sector.
- **The EU-27 workforce of the agriculture sector, consisting of around 8.4 million workers, is organised by 58 sector-related national-level trade unions**. There is at least one trade union organisation in 23 of the EU Member States. Agriculture sector workers are not represented by any trade union in four Member States: Estonia, Greece, Latvia and Malta.
- **The agriculture sector companies, amounting to 9.1 million in the EU-27, are represented by 86 sector-related national-level employer organisations**. There is at least one employer organisation in all 27 Member States. Twenty Member States record more than one employer organisation.
- Although there are significantly more employer organisations and business associations than trade unions in the agriculture sector, the number of employer organisations involved in sector-related collective bargaining is below that of the trade unions engaged in bargaining. **There are 56 trade unions in 21 Member States, compared with only 47 employer organisations in 16 Member States, that conduct collective bargaining in the sector. Overall, sectoral (multi-employer) bargaining prevails over company-level bargaining**. In the remaining Member States where there is collective bargaining, this takes place at the single-employer level.

-
- **The most representative European organisation representing the workforce in the agriculture sector is the European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT), which has 42 affiliated sector-related national trade unions in 23 Member States** under its umbrella. These national trade unions organise only a relatively small part of the total EU workforce in the sector, representing between 4 % and 9 % of the workforce depending on how the workforce is defined, as explained in Chapter 1 (i.e. including or excluding persons working on a part-time basis, seasonal workers and family workers providing unpaid labour). However, as explained in the same chapter, these percentages are likely to be underestimated due to a high share of missing data. About three quarters of the trade unions affiliated to EFFAT organise workers in each of the following agricultural activities: crop growing, animal production, mixed farming and support activities related to agriculture. Some 95 % of the EFFAT-affiliated trade unions are involved in sector-related collective bargaining.
 - **The most representative European organisation representing the companies active in the agriculture sector is the Employers' Group of Professional Agricultural Organisations in the European Union / Committee of Professional Agricultural Organisations in the European Union (GEOPA-COPA), which has 23 affiliated sector-related national employer organisations in 18 Member States** under its umbrella. These national employer organisations represent at least 41 % of all companies in the sector. All GEOPA-COPA member organisations (except for one affiliate in Poland) represent farms/companies in each of the following agricultural activities: crop growing, animal production and mixed farming. Some 15 of the 23 GEOPA-COPA affiliates (65 %) in 13 Member States are involved in sector-related collective bargaining.

On the trade union side, there are no EU-level organisations other than EFFAT that are representative of the agriculture sector. On the side of employers, no EU-level organisation other than GEOPA-COPA was identified to have significant representativeness. However, in Chapters 2, 4, 5 and 6, the relation between the organisations GEOPA, COPA and the General Confederation of Agricultural Cooperatives (COGECA) is explained: COPA represents the interests of EU agricultural producers forming professional agricultural organisations that are employer organisations / business associations rather than individual enterprises; GEOPA, mandated to act as COPA's employer group, specialises in dealing with employer interests and social dialogue, as opposed to the interests of farmers in other policy areas; and COGECA, in turn, represents and defends the interests of the agricultural cooperatives by organising national associations representing these cooperatives.

Introduction

The purpose of this study is to assess the representativeness of the European social partners in the agriculture sector, defined by NACE (general industrial classification of economic activities within the European Union) Revision 2 codes 01.1–01.7, based on the membership of the affiliated national organisations. This assessment enables the European Commission to decide which organisations should be retained in or added to the list of organisations entitled to consultation under Article 154 of the Treaty on the Functioning of the European Union (TFEU). In the case of European social partner agreements, required to be implemented by means of a Council directive, as set out in Article 155 of the TFEU, the regulatory powers granted to European social partners are based on their representativeness.

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 (Commission Decision 98/500/EC). For an organisation to be recognised as a representative EU social partner organisation, it must meet several criteria, such as:

- being related to specific sectors or categories and being organised at the European level;
- being representative of organisations that are themselves an integral and recognised part of the EU Member States' social partner structures, that have the capacity to negotiate labour agreements and that are representative of several Member States;
- having adequate structures to ensure the organisation's effective participation in the work of a European sectoral social dialogue committee (ESSDC).

Sector factsheet

Agriculture sector	
Relevant NACE codes	01.1 – Growing of non-perennial crops 01.2 – Growing of perennial crops 01.3 – Plant propagation 01.4 – Animal production 01.5 – Mixed farming 01.6 – Support activities to agriculture and post-harvest crop activities 01.7 – Hunting, trapping and related service activities
Sector share of EU gross domestic product (GDP)	1.2 % of the EU-27 GDP (2024)
Number and size breakdown of companies in the sector (total and in terms of employment)	9.1 million companies (2022) Distribution of agriculture holdings by agricultural area: < 2 ha: 42.6 % of holdings 2–9.9 ha: 33.6 % of holdings 10–49.9 ha: 16.4 % of holdings 50–99.9 ha: 3.9 % of holdings 100–249.9 ha: 2.7 % of holdings ≥ 250 ha: 0.9 % of holdings
Employment in the sector – including the total from the most recent year available	8.4 million workers (2023) Romania, Poland, Italy and Spain employ over 60 % of the EU-27 sectoral workforce (2023)
The organisations involved in social dialogue at the EU level	
Trade union	
Name of representative EU-level trade union organisation	European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT)
Number of Member States covered by affiliated members (with mention of Member States not covered where the sector exists)	42 national sectoral trade unions are affiliated to EFFAT in all 23 Member States in which there is a union organising workers in the agriculture sector. There are no trade unions organising workers in the agriculture sector in Estonia, Greece, Latvia and Malta.
Number of persons employed and share of EU workforce represented by all affiliates	EFFAT's members represent 72 % of the sectoral trade unions, organising close to 700 000 workers in the agriculture sector, which represents between 4 % and 9 % of the total workforce in the sector (depending on whether persons working on a

	part-time basis, seasonal workers and family workers providing unpaid labour are included or excluded).
Share of EU workforce covered by collective agreements negotiated by affiliates in the sector	No data are available on the coverage of collective bargaining agreements in which EFFAT members are involved. Coverage ranges from 5 % to 100 % in 12 Member States. 95 % of EFFAT members are involved in collective bargaining in all 21 Member States where collective bargaining takes place for the sector. No collective bargaining takes place in Lithuania or Luxembourg. Additionally, since there are no trade unions organising workers in the agriculture sector in Estonia, Greece, Latvia or Malta, no collective bargaining is recorded there.
Employer organisation	
Name of representative EU-level employer organisation	Employers' Group of Professional Agricultural Organisations in the European Union / Committee of Professional Agricultural Organisations in the European Union (GEOPA-COPA)
Number of Member States covered by affiliated members (with mention of Member States not covered where the sector exists) for each relevant organisation	23 of the 86 national agriculture-sector-related employer organisations are affiliated to GEOPA-COPA (or 27 % of national sectoral employer organisations) in 18 Member States (Austria, Belgium, Croatia, Cyprus, Czechia, Denmark, Finland, France, Hungary, Ireland, Italy, Latvia, Lithuania, Poland, Portugal, Slovenia, Spain and Sweden). The only Member States in which there are agriculture employer organisations but GEOPA-COPA has no employer organisations or companies as members are Bulgaria, Estonia, Germany, Greece, Luxembourg, Malta, the Netherlands, Romania and Slovakia.
Share of companies covered by affiliates	GEOPA-COPA members represent 3 776 790 agricultural holdings, representing 42 % of the total number of agricultural holdings in the EU-27.
Number of workers and share of EU sectoral workforce represented by affiliates	No figures could be calculated due to missing data.
Share of EU workforce covered by collective agreements negotiated by affiliates in the sector	No data are available on the coverage of collective bargaining agreements in which GEOPA-COPA members are involved. Coverage ranges from 5 % to 100 % in 13 Member States. 65 % of GEOPA-COPA members are involved in collective bargaining in 13 Member States.

	No collective bargaining takes place in Lithuania and Luxembourg. No employer organisations from Bulgaria, Croatia, Poland, Romania or Slovakia are involved in collective bargaining for the sector. Additionally, as no trade union organises workers in the agriculture sector in Estonia, Greece, Latvia or Malta, no collective bargaining is recorded there.
Key challenges for the sector	
Main challenges in the sector	• The fall in prices of many agricultural products. • Possible further trade liberalisation under the framework of World Trade Organization negotiations. • Climate change. • Labour shortages and the lack of attractiveness of the sector to a future workforce.
Key themes of social dialogue	
Key themes covered by social dialogue in the sector in the last 10 years	• The consequences of the common agricultural policy (CAP) for future employment in the sector. • Vocational training and continuous training. • Improving working conditions for all categories of workers. • Health and safety and accident prevention. • Addressing the impact of demographic change. • Addressing the impact of climate change.

1. Sector overview

1.1. Scope and economic background of the agriculture sector

The scope of the agriculture sector in the current study is defined by NACE codes 01.1–01.7 (Table 1). The same activities were included in the previous representativeness study for the sector, published in 2016.

Table 1: Classification of activities in the agriculture sector based on NACE codes

NACE code	Activity description
01.1	Growing of non-perennial crops - o 01.11 – Growing of cereals (except rice), leguminous crops and oil seeds - o 01.12 – Growing of rice - o 01.13 – Growing of vegetables and melons, roots and tubers - o 01.14 – Growing of sugar cane - o 01.15 – Growing of tobacco - o 01.16 – Growing of fibre crops - o 01.19 – Growing of other non-perennial crops
01.2	Growing of perennial crops - o 01.21 – Growing of grapes - o 01.22 – Growing of tropical and subtropical fruits - o 01.23 – Growing of citrus fruits - o 01.24 – Growing of pome fruits and stone fruits - o 01.25 – Growing of other tree and bush fruits and nuts - o 01.26 – Growing of oleaginous fruits - o 01.27 – Growing of beverage crops - o 01.28 – Growing of spices, aromatic, drug and pharmaceutical crops - o 01.29 – Growing of other perennial crops
01.3	Plant propagation (the process by which new plants grow from a variety of sources, including seeds, cuttings and other plant parts)
01.4	Animal production - o 01.41 – Raising of dairy cattle - o 01.42 – Raising of other cattle and buffaloes - o 01.43 – Raising of horses and other equines - o 01.44 – Raising of camels and camelids - o 01.45 – Raising of sheep and goats - o 01.46 – Raising of swine/pigs - o 01.47 – Raising of poultry - o 01.49 – Raising of other animals
01.5	Mixed farming
01.6	Support activities to agriculture and post-harvest crop activities - o 01.61 – Support activities for crop production - o 01.62 – Support activities for animal production - o 01.63 – Post-harvest crop activities (preparation of agricultural crops for sale, such as cleaning, sorting, stripping, sun-drying and packing of various agricultural products on a fee or contract basis) - o 01.64 – Seed processing for propagation
01.7	o Hunting, trapping and related service activities

Source: NACE Rev. 2.

Agriculture is an essential sector that not only represents a central pillar of the EU's cohesion, economic resilience and food security, but also employs at least around 4 % of the EU-27 workforce ⁽¹⁾ and contributed 1.2 % to the EU's GDP in 2024. This share has not changed significantly during the past two decades. The EU's agriculture industry output was approximately EUR 532 billion in 2024; one half of this value came from crop production, and slightly more than two fifths came from animal production. The contributions from the Member States varied significantly, with France, Germany, Italy and Spain constituting the 'big four' and contributing about 57 % of the EU's total output value in 2024 (Eurostat, 2026a). The sector has long been supported and impacted by the CAP, with the aim of ensuring affordable food, decent income for farmers, sustainable rural development and the protection of natural resources (European Council and Council of the European Union, 2025). Most of the economic and structural trends outlined in the previous representativeness study from 2016 have continued to date (Eurofound, 2016). This applies to the still-decreasing number of farms / production units and some declining parts of sectoral employment (i.e. independent employment, in contrast to dependent employment, which remains stable). The trend in utilised agricultural area (UAA) has remained relatively unchanged; the average size of farms in the EU continues to increase; the fact that farming remains a predominantly family activity remains unchanged; and the fact that farm managers are still predominantly male and relatively old remains unchanged (Eurostat, 2022).

However, since the 2010s, EU agriculture has evolved from a model focused primarily on production and income support to one that emphasises sustainability, resilience, rural development and general renewal. This development has been governed by a realignment of the CAP, which has gradually shifted towards stronger environmental and climate goals. Nevertheless, challenges remain in fully aligning agriculture with those aims while maintaining competitiveness and adequate farmer income (European Commission, n.d.-a).

In 2013, against the background of emerging new challenges, such as stronger global competition, climate change impacts, volatile input costs and the need to modernise many farm businesses, a reform of the CAP was launched. It was subsequently implemented from 2014 to 2020. The aims of this reform were to move from production-based subsidies to income support, to generally strengthen the environmental dimensions of the policy and to improve rural development. The result was an effective decoupling of payments from production to reduce market distortions and place more emphasis on environmental measures and sustainability, with the effect of raising agricultural production from 2010 to 2020 by 9 % and decreasing greenhouse gas emissions from agriculture, although the pace of these changes has slowed down (European Commission, n.d.-b).

At the beginning of 2020, the COVID-19 pandemic disrupted supply chains, labour availability and markets in agriculture. At the same time, input costs (in particular, for energy and fertilisers) rose sharply, a trend that was further exacerbated by Russia's illegal invasion of Ukraine in early 2022 and its ripple effects on global commodity and feed markets since (OECD, 2023). As these shocks further increased pressures on farm income, risk management and the resilience of food systems in the EU, a new CAP strategy (Regulation (EU) 2021/2115) for 2023–2027 was adopted. This reform was devised to empower Member States to create national strategic plans to meet EU goals while

(¹) Eurostat, 'Employment by detailed industry (NACE Rev. 2) – national accounts', nama_10_a64_e__custom_18712642, last updated 13 May 2026; and Eurostat, 'Employed persons by citizenship', ifsa_egan__custom_18744820, last updated 17 April 2026.

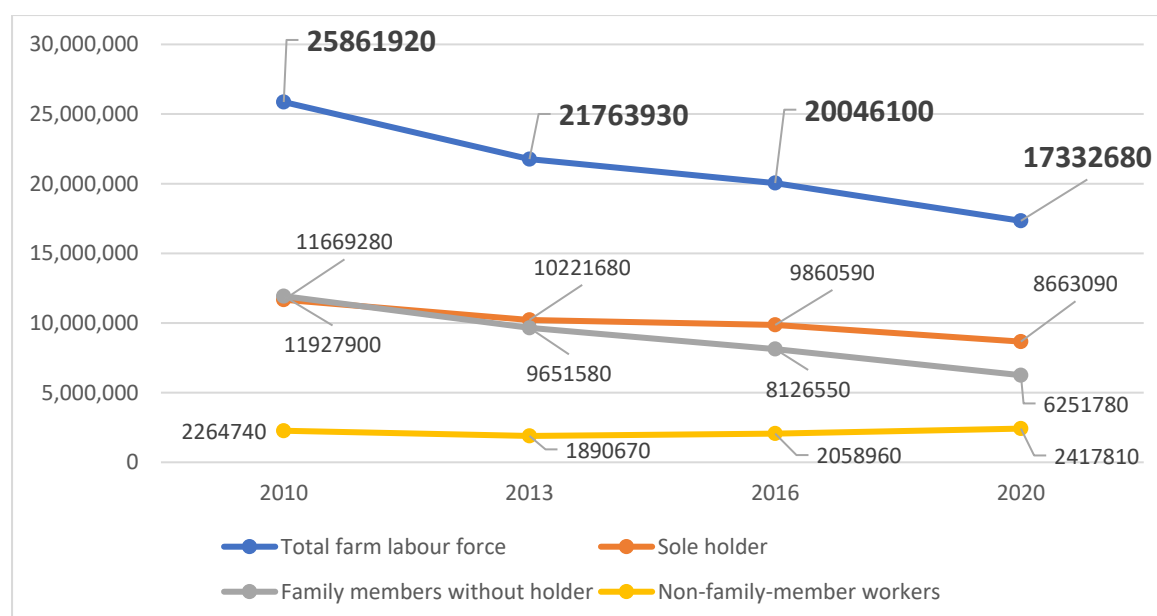
tailoring measures to local needs. The aim is to match economic (competitiveness) and social / fair income goals with those related to climate change action, biodiversity restoration, and soil and water protection. The new CAP framework also included a social conditionality mechanism, as a consequence of, among other things, the COVID-19 pandemic, which brought to light some of the deplorable working and living conditions that led to major COVID-19 outbreaks among agricultural workers. However, key challenges remain, such as the need to reduce livestock emissions, adapt to climate change impacts (drought, pests, extreme weather) and balance productivity with sustainability (European Commission: Directorate-General for Agriculture and Rural Development, 2024). Future priorities of EU agriculture policies will probably include the further digitalisation of farming, precision agriculture, promoting circular economies in agri-food systems and stronger links between food quality, the origin of products and sustainability (European Commission, n.d.-c).

1.2. The agriculture workforce in the EU-27

Capturing the volume of employment in EU agriculture is not as straightforward as it might appear at first glance. This is because many farmers and agricultural workers pursue agriculture as a part-time or sideline activity, many farms are family-run enterprises, strongly depending on family members (informally) providing support on the farm at different times of the year, and the annual cycle of agricultural activities, with seasonal peaks (seeding, harvesting, etc.), necessitates seasonal fluctuations in labour demand (Eurostat, 2022).

Against this background, Eurostat deploys different methods to quantify the agricultural workforce. On the one hand, its employment data include employees and self-employed persons while excluding many part-time farmers and (informal) help from family members. This measurement method is thus relatively narrow in terms of its coverage of the agricultural workforce and accounted for 8.4 million workers or 4 % of EU-27 employment in 2023. On the other hand, Eurostat's concept of the regular agricultural labour force at the broadest category includes persons working on a part-time basis and those providing free labour, which is widespread among family members of farmers. This measurement method estimated the total number of workers in the agricultural labour force at about 17 million in 2020 or about 8.8 % of the EU-27 labour force. Figure 1 shows the development of the EU-27 regular agricultural labour force from 2010 to 2020. The total size of the EU-27 agricultural labour force diminished from slightly more than 25 million in 2010 to slightly more than 17 million in 2020, which corresponds to a reduction of 33 % within the 10-year period. Figure 1 also indicates that the number of sole farm holders decreased less dramatically than the number of family members (not including the farm holder) engaged in any form of farm work. Interestingly, the group of non-family-member workers in the farm labour force, which is largely congruent with the dependently employed labour force (employees), is the only category of farm workers that even slightly increased in terms of absolute numbers from 2010 to 2020, standing at about 2.4 million in 2020.

Figure 1: Number of persons employed in the agriculture sector (regular agricultural labour force) by type of employment, EU-27, 2010–2020



Source: Eurostat (tag00020__custom_18698588).

Table 2 shows the regular agricultural labour force for the EU-27 and all Member States in 2020 and – if available – 2023. The table also provides information on the size of the Member States' agricultural labour force as a proportion of the EU-27 sectoral workforce and the respective Member States' sectoral workforce. Moreover, the table shows the relative change in the Member States' agricultural workforce compared with 2016.

There are four Member States – Italy, Poland, Romania and Spain – that record a share of at least 10 % of the EU-27 agricultural workforce. Romania is most notable in this respect, with a share of about 26 % of the total EU workforce in this sector. With regard to the respective shares of the agricultural workforce out of the total national workforce, 10 Member States can be identified where at least 10 % of the national workforce is employed in agriculture. This group of Member States consists of Croatia, Cyprus, Greece, Ireland, Latvia, Lithuania, Poland, Portugal, Romania and Slovenia. However, this statistic is misleading insofar as it compares categories of agricultural workers, such as family members and seasonal/casual workers, with total numbers for national employment that do not include these categories of workers. Hence, the respective shares shown in Table 2 are apparently dramatically overestimated (see, for example, the numbers for Romania). Therefore, employment data as deployed by Eurostat – including both employees and self-employed workers (see Table 3) – are more useful for estimating the share of agricultural employment as a share of the total of national employment, since these data allow for comparisons across different sectors of the economy. The data in Table 2 show that the regular agricultural labour force decreased in 21 Member States from 2016 to 2020/2023, while it increased in Denmark, Greece, Ireland, the Netherlands, Portugal and Romania. Looking at the employment data in Table 3, the number of Member States in which the agriculture workforce increased is higher: Cyprus, Greece, Italy, Latvia, Luxembourg, Malta, the Netherlands, Spain and Sweden all reported growth.

Table 2: Regular agricultural labour force, by Member State, EU-27, 2020 and 2023

Member State	Number of persons employed in agriculture in 2020/2023	Size of non-family-member farm labour force in 2020/2023	Share of EU-27 sectoral workforce (total workforce) in 2020 (%)	Share of total national employment (%)	Relative change in employment compared with 2016 (%)
EU-27	17 332 690 / n.d.	2 417 800 / n.d.	100	8.8 ^(a)	−13.5 ^(a)
Austria	287 030 / 281 970	22 240 / 44 510	1.7	6.3 ^(b)	−11.6 ^(b)
Belgium	67 940 / n.d.	18 760 / n.d.	0.4	1.4 ^(a)	−4.2 ^(a)
Bulgaria	290 720 / 254 910	61 390 / 60 080	1.7	8.7 ^(b)	−42.0 ^(b)
Croatia	331 610 / 295 650	25 910 / 21 310	1.9	18.3 ^(b)	−7.0 ^(b)
Cyprus	72 350 / 67 320	5 990 / 6 720	0.4	14.0 ^(b)	−7.7 ^(b)
Czechia	124 440 / 127 910	75 790 / 74 160	0.7	2.5 ^(b)	−1.8 ^(b)
Denmark	80 240 / n.d.	33 280 / n.d.	0.5	2.8 ^(a)	+9.4 ^(a)
Estonia	30 600 / 26 890	13 640 / 13 140	0.2	3.8 ^(b)	−29.9 ^(b)
Finland	102 270 / n.d.	21 750 / n.d.	0.6	4.0 ^(a)	−8.6 ^(a)
France	762 160 / 715 900	426 350 / 418 640	4.4	2.5 ^(b)	−16.7 ^(b)
Germany	648 390 / 617 250	191 450 / 193 510	3.7	1.5 ^(b)	−5.6 ^(b)
Greece	1 380 870 / 1 225 320	28 710 / 25 470	8.0	29.2 ^(b)	+2.2 ^(b)
Hungary	476 290 / 377 250	97 610 / 95 520	2.7	8.0 ^(b)	−53.7 ^(b)
Ireland	274 960 / n.d.	34 110 / n.d.	1.6	12.0 ^(a)	+3.7 ^(a)
Italy	1 836 570 / n.d.	349 270 / n.d.	10.6	8.1 ^(a)	−10.2 ^(a)
Latvia	155 070 / n.d.	21 610 / n.d.	0.9	17.4 ^(a)	−4.6 ^(a)
Lithuania	240 800 / 211 480	33 520 / 26 980	1.4	14.7 ^(b)	−17.3 ^(b)
Luxembourg	4 670 / 4 700	1 150 / 1 140	0.0	1.5 ^(b)	−1.7 ^(b)
Malta	10 280 / 12 420	420 / 510	0.1	4.1 ^(b)	−19.5 ^(b)
Netherlands	175 750 / 185 550	62 460 / 76 060	1.0	1.9 ^(b)	+7.5 ^(b)
Poland	2 714 030 / n.d.	116 840 / n.d.	15.7	16.0 ^(a)	−12.1 ^(a)
Portugal	648 040 / 626 800	73 200 / 83 140	3.7	12.4 ^(b)	+3.8 ^(b)
Romania	4 504 470 / 7 352 200	84 990 / 117 480	26.0	95.5 ^(b)	+21.3 ^(b)
Slovakia	64 690 / 56 450	37 350 / 33 450	0.4	2.2 ^(b)	−28.7 ^(b)
Slovenia	194 740 / n.d.	2 750 / n.d.	1.1	20.0 ^(a)	−0.7 ^(a)
Spain	1 729 350 / 1 676 310	555 660 / 625 640	10.0	7.9 ^(b)	−10.2 ^(b)

Member State	Number of persons employed in agriculture in 2020/2023	Size of non-family-member farm labour force in 2020/2023	Share of EU-27 sectoral workforce (total workforce) in 2020 (%)	Share of total national employment (%)	Relative change in employment compared with 2016 (%)
	(820 200 / 753 200)				
Sweden	124 360 / 121 330	21 600 / 23 820	0.7	2.3 ^(b)	–6.1 ^(b)

^(a) Reference year is 2020.

^(b) Reference year is 2023.

Notes: n.d., data not available. Brackets are used for the number of persons employed in agriculture for Spain, as during the reviewing period the Spanish organisation Asociación Agraria Jóvenes Agricultores indicated that the Spanish Working Population Survey (Encuesta de Población Activa) listed different figures for Spain. For comparability purposes, the Eurostat figures will be referred to in this report.

Source: Authors' calculations based on Eurostat (tag00020__custom_18698588) and Eurostat (lfsa_egan__custom_187041287).

As mentioned above, Table 3 includes data on employment in the agriculture sector as collected by Eurostat, thus covering only the categories of employees (in standard employment relationships) and self-employed workers. These employment data are therefore much more comparable with other sectors of the economy and with the overall economy than the broader agricultural labour force data. Table 3 shows that there were about 8.4 million persons employed in the sector in 2023, of whom less than one third were dependent employees and more than two thirds self-employed workers. Poland and Romania record employment figures exceeding 1 million, with the vast majority of persons employed in these Member States being self-employed. While in most Member States the self-employed persons in the sector (clearly) outnumber the employees, there are several Member States with more employees, namely Czechia, Denmark, Estonia, Germany, Hungary, Latvia, Lithuania, the Netherlands, Slovakia and Spain. This may be related to the fact that in some Member States, such as Germany, the Netherlands and Spain, large agricultural companies pursue a business model based on large-scale production with lower staffing requirements. On the other hand, in some central and eastern Member States, the tradition of collective farming stemming from the era of real socialism may have left behind a legacy of genuine dependency on agricultural employment relationships.

Table 3 also indicates that agricultural employment as a share of total national employment is, overall, less pronounced than the agricultural labour force as a share of total national employment (see Table 2). Only in Bulgaria and Romania is the share of sectoral employment higher than 10 %, while in most Member States the proportion of agricultural workers does not exceed 4 %.

Table 3: Employment in the agriculture sector, by Member State, EU-27, 2023

	Number of persons employed in agriculture	Number of employees in agriculture	Number of self-employed workers in agriculture	Share of total national employment (%)	Relative change in employment compared with 2015 (%)
EU-27	8 428 950	2 666 500	5 761 460	3.9	−12.7
Austria	119 000	22 600	96 400	2.5	−21.4
Belgium	56 000	26 900	29 100	1.1	−2.3
Bulgaria	492 450	79 270	413 180	14.1	−20.7
Croatia	62 850	27 130	35 720	3.8	−44.7
Cyprus	14 870	6 340	8 540	3.0	+7.4
Czechia	130 980	90 350	40 630	2.4	−5.2
Denmark	56 310	34 600	21 710	1.8	−6.8
Estonia	12 090	8 380	3 710	1.8	−26.4
Finland	58 300	18 000	40 300	2.1	−21.6
France	658 100	324 200	333 900	2.2	−4.7
Germany (*)	521 000	317 000	204 000	1.1	−11.2
Greece (*)	487 800	101 600	386 200	9.5	+0.9
Hungary	141 810	98 320	43 490	3.0	−7.8
Ireland	101 490	22 810	78 680	3.8	−2.3
Italy	885 200	410 100	475 100	3.9	+2.5
Latvia	58 290	33 290	25 000	6.3	+18.0
Lithuania	63 640	33 120	30 520	4.3	−39.3
Luxembourg	4 000	1 320	2 680	0.8	+17.7
Malta	2 670	830	1 840	0.9	+19.3
Netherlands	190 000	98 000	92 000	1.9	+1.1
Poland	1 373 100	109 300	1 263 800	7.8	−22.0
Portugal	272 030	88 740	183 290	5.2	−27.8
Romania	1 760 200	201 300	1 558 900	20.7	−19.8
Slovakia	43 910	36 310	7 600	1.8	−9.2
Slovenia	63 160	2 990	60 170	5.7	−9.5
Spain (*)	723 700	447 700	276 000	3.4	+0.5
Sweden	76 000	26 000	49 000	1.4	+4.1

(*) Data for this Member State are provisional.

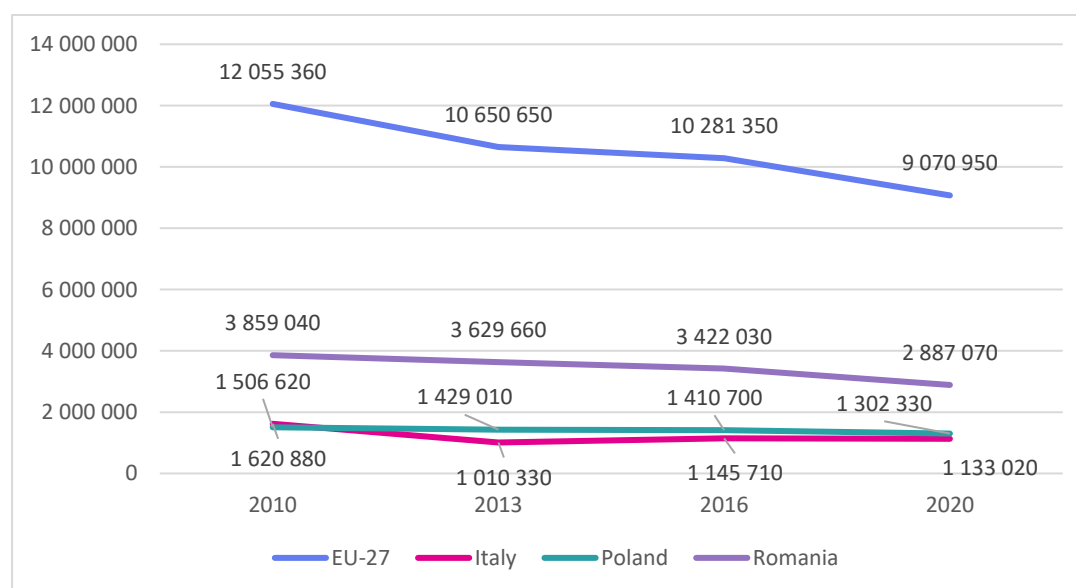
Source: Authors' calculations based on Eurostat (nama_10_a64_e__custom_18712642) and Eurostat (lfsa_egan__custom_18744820).

1.3. Agriculture sector companies in the EU-27

Not only has the number of farmers and those employed in agriculture steeply declined, so has the number of farms/holdings. From 2010 to 2020, the number of agricultural holdings in the EU-27 fell from around 12 million to 9.1 million. In a few Member States, such as Bulgaria and Hungary, the number of agricultural holdings decreased dramatically within this period, from around 370 000 to around 133 000 in Bulgaria and from around 572 000 to around 232 000 in Hungary. In terms of absolute numbers, the losses were highest in Italy and Romania, where almost half a million and almost a million holdings, respectively, ceased to exist. Figure 2 illustrates the development of the number of holdings from 2010 to 2020 for the EU-27 and the three Member States (Italy, Poland and Romania) with more than one million holdings in 2020. This figure shows that the losses in Italy and Romania in relative terms largely correspond to the general trend of the EU-27 (–25 % or slightly more), while the relative losses in Poland fall short of the overall trend. In absolute terms, however, those three Member States together represent a decline of almost 1.7 million holdings and thus account for more than 50 % of the holdings lost from 2010 to 2020.

Still, of the 9.1 million agricultural holdings in the EU-27, 2.9 million holdings were located in Romania in 2020. This is more than twice as many as the number of farms in the Member State with the next most farms, Poland, with 1.3 million farms.

Figure 2: Number of holdings in the agriculture sector, EU-27 and three select Member States, 2010–2020



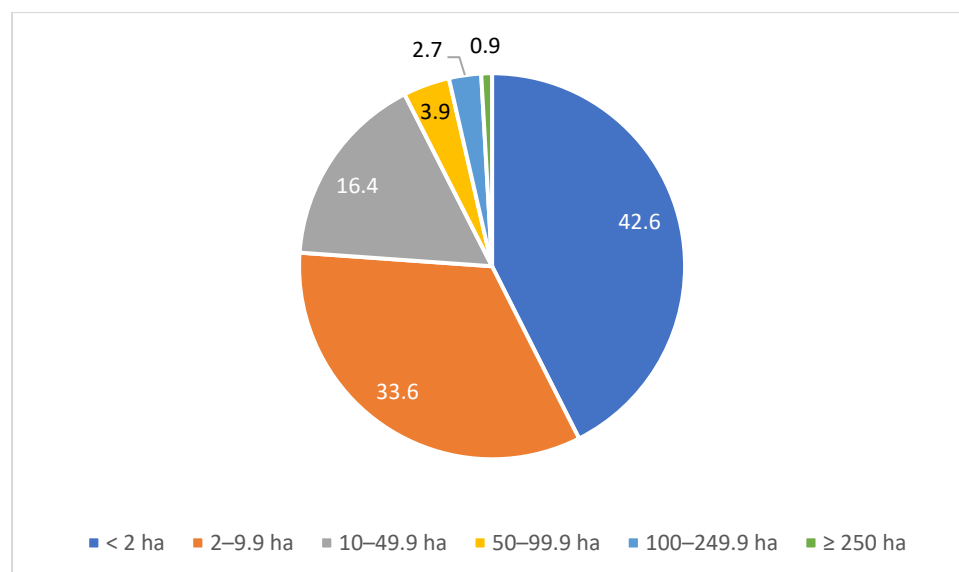
Source: Eurostat (tag00001__custom_18698323).

Since, in contrast to most other sectors, company size in agriculture is not measured in terms of the size of the workforce, two other indicators used by Eurostat have been deployed to categorise farms/holdings in terms of size. The first one is geographical size, the agricultural area utilised by the farm, while the second one is economic size, its standard output (in euro).

Figure 3 depicts the distribution of agricultural holdings by UAA in the EU-27. The figure shows that a large proportion of holdings (42.6 %) have less than 2 ha (including those holdings with 0 ha) for agricultural production, while less than 8 % of EU holdings utilise 50 ha or more. The average mean

size of an agricultural holding in the EU-27 was 17.4 ha in 2020; only about 18 % of EU farms were this size or larger. Strikingly, looking at the number of EU farms and distribution of UAA according to farm size reveals that the nearly 8 % of EU farms utilising 50 ha or more for farming made up more than two thirds of the EU's UAA (Eurostat, 2026b). Larger farms of 50 ha or more were more common in some Member States such as Luxembourg (53 % of farms), France (46 %), Finland (33 %) and Germany (32 %). Larger farms with 50 ha or more were very rare in Romania (less than 1 % of farms) – although even in this Member State they represented 54 % of all the UAA in the Member State in 2020 (Eurostat, 2026b).

Figure 3: Proportion of agricultural holdings by UAA, EU-27, 2020 (%)

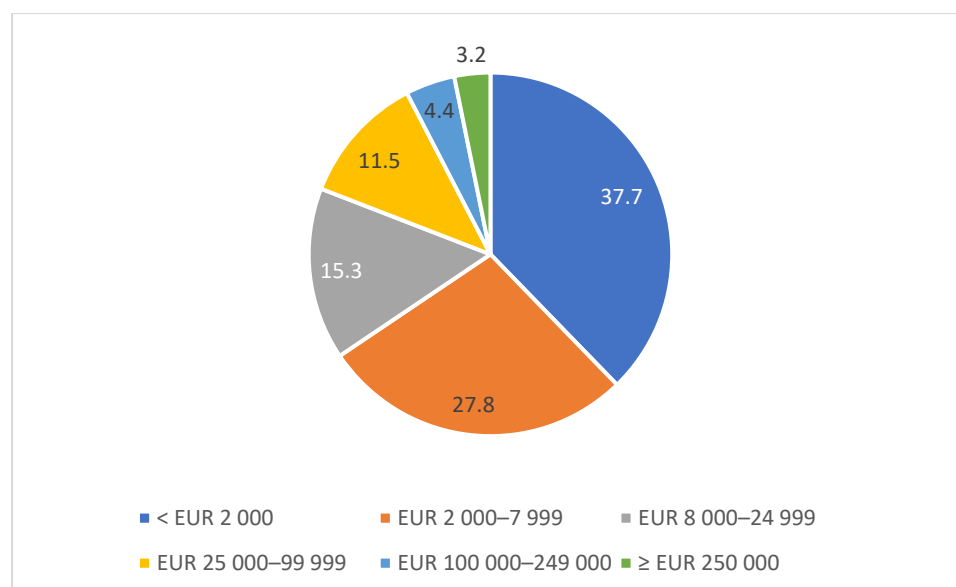


Note: The category 'Less than 2 ha' also includes 126 500 holdings with 0 ha of UAA.

Source: Authors' calculations based on Eurostat (tag00001__custom_18699452).

There is a similar distribution of EU holdings when one looks at the proportion of agricultural holdings by economic size of the farm in terms of standard output (Figure 4). Two thirds of EU agricultural holdings generate a standard output of less than EUR 8 000 per year (including those holdings with EUR 0 of standard output). Less than 8 % of all EU holdings yield a standard output of EUR 100 000 or more per year.

Figure 4: Proportion of agricultural holdings by economic size of the farm (standard output in euro), EU-27, 2020



Note: The category ‘Less than EUR 2 000’ also includes 75 640 holdings with EUR 0 of standard output.

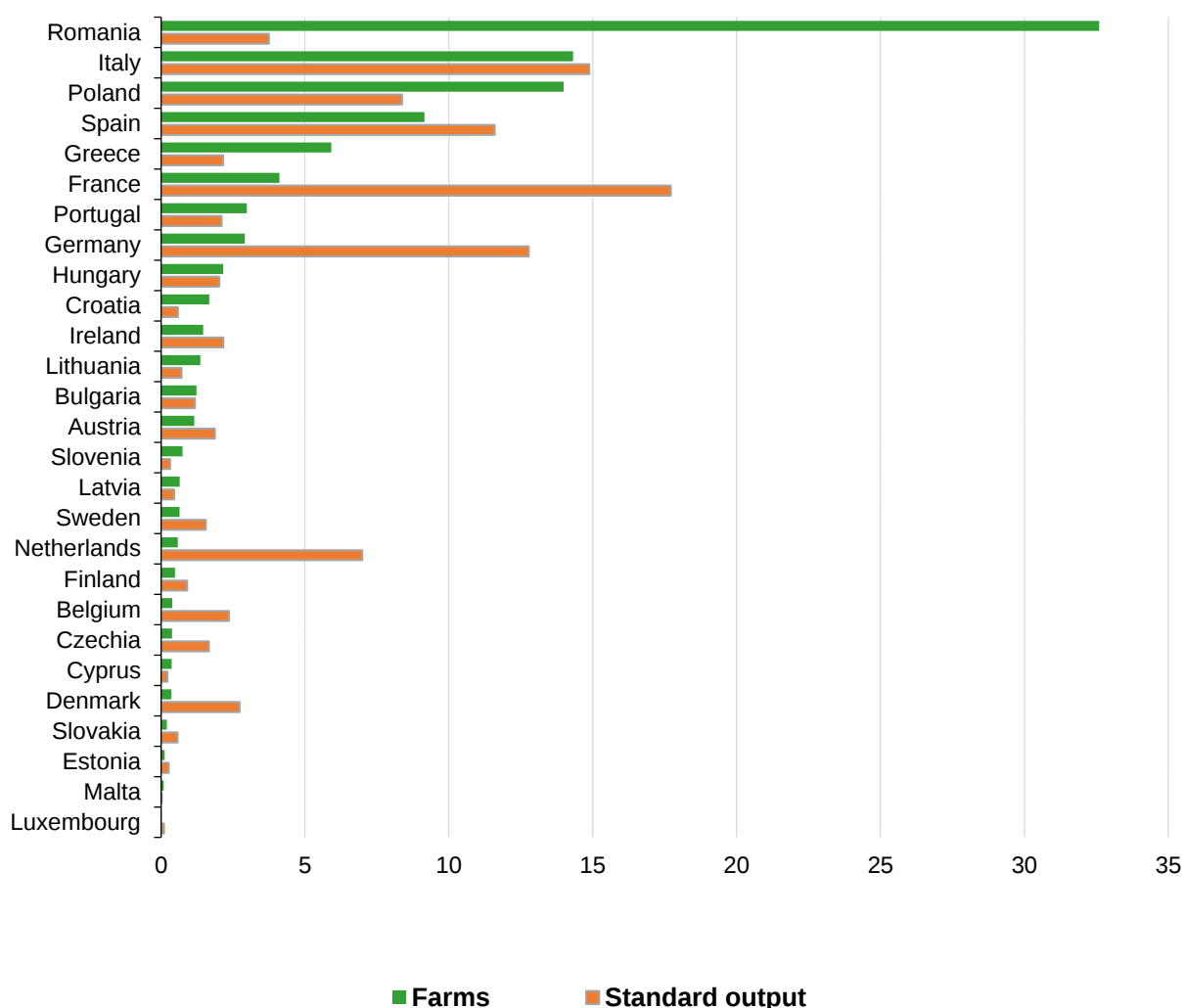
Source: Authors’ calculations based on Eurostat (tag00123__custom_18699476).

Categorising farms according to their economic size allows for a rough distinction to be made between three groups of farms in the EU-27. Broadly speaking, semi-subsistence farms, which aim to grow a high proportion of the food needed to feed the farmers and their families, can be distinguished from small and medium-sized farms, which are usually family-run businesses, and large agricultural enterprises, which are often legal corporations or cooperatives. Semi-subsistence farms can usually be found among the holdings with the lowest economic output, and small and medium-sized farms seldom generate an economic output of more than EUR 250 000 per year. On the other hand, the approximately 300 000 farms that produced a standard output of EUR 250 000 or more per year in 2020 can typically be classified as large agricultural enterprises. Almost half of them had a legal or group-holding organisational form. These largest farms with more than EUR 250 000 standard output per year were responsible for about 56 % of the EU-27’s total agricultural economic output in 2020 (Eurostat, 2026b).

The vast majority of EU-27 farms, namely about 93 %, are classified as family farms. These are defined by Eurostat as farms where half or more of the agricultural labour force is provided by family members of the holder. Such family farms were, in 2020, the prevailing farm type in all Member States, even though non-family farms made up 42 % of all farms in France and 35 % of all farms in Estonia (Eurostat, 2026b).

Figure 5 depicts the distribution of farms and agricultural economic output across the Member States to illustrate the variance between Member States in the standard output per agricultural production unit.

Figure 5: Share of farms and standard output as a proportion of the EU total, 2023 (%)



Sources: Eurostat (ef_m_farmleg) and Eurostat, 2026b.

1.4. National sectoral trade unions and employer organisations and their collective bargaining coverage

The current study identifies 58 sector-related trade unions in 23 Member States and 86 sector-related employer organisations in all 27 Member States (Figure 6). There are no sector-related trade unions in Estonia, Greece, Latvia and Malta. The number of trade unions per Member State in the remaining 23 Member States ranges from one (in nine Member States) to six (in France). Hence, a pluralist associational system in the agriculture sector on the side of organised labour can be found in 14 Member States. On the employer side, the number of sector-related employer organisations ranges from 1, in seven Member States, to as many as 10, in one Member State (Portugal). Pluralist

associational landscapes in the sector on the side of organised business can be identified in 20 Member States.

[illegible]

Source: Network of Eurofound Correspondents, 2022.

Figure 7: Number of sectoral trade unions and employer organisations involved in collective bargaining, 2022

Notes: EO, employer organisation; MS, Member State; TU, trade union. Green-coloured cells indicate the number of national-level trade unions involved in collective bargaining for the agriculture sector; blue-coloured cells indicate the number of national-level employer organisations involved in collective bargaining for the agriculture sector.

1.5. Changes in the national trade unions' and employers' landscape and in the representativeness of EFFAT and GEOPA-COPA

representativeness. No unions were recorded in Estonia, Greece and Latvia in 2016, and this remained the case in 2022, while the Maltese union GWU indicated that it no longer organises workers in the sector. For the reasons for changes in the number of sector-related trade unions per Member State compared with the previous representativeness study on the agriculture sector, see Chapter 3 below. However, it is important to note that the reasons for the emergence of ‘new’ unions or the disappearance of ‘old’ ones could not be tracked down in all cases.

Table 4: Comparative overview of national agriculture trade unions identified in 2015 and 2022

Member State	Change in number of all sectoral trade unions compared with the previous representativeness study	Change factors ⁽²⁾
AT	–1	Organisational factors / loss of members
BE	+2	n.d.
BG	0	
CY	+1	n.d.
CZ	0	
DE	0	
DK	0	
EE	0	
EL	0	
ES	0	
FI	–1	Organisational factors / loss of members
FR	0	
HR	0	
HU	0	
IE	0	
IT	–2	Organisational factors / loss of members
LT	0	
LU	–1	Organisational factors / loss of members
LV	0	
MT	–1	Organisational factors / loss of members
NL	0	
PL	0	
PT	0	
RO	+1	Organisational factors
SE	–2	n.d.
SI	0	
SK	0	

Notes: n.d., data not available.

Sources: Network of Eurofound Correspondents, 2015 and 2022.

Table 5 compares the findings of the previous representativeness study (Eurofound, 2016), containing data from 2015, with the findings in the current report, which captures the situation in terms of national employer organisations identified as representing agricultural companies and farms. In 2016, 100 employer organisations were identified in 27 Member States and the United Kingdom, a member of the EU at the time and thus included in the assessment of representativeness. The current study identifies 86 employer organisations active at the national or

⁽²⁾ A detailed explanation of the factors explaining the changes in the number of organisations at the national level is available in Table 31 in the Annex.

regional level in 27 Member States. For the reasons for changes in the number of sector-related employer organisations and business associations per Member State compared with the previous representativeness study on the agriculture sector, see Chapter 4 below. Again, it is important to note that the reasons for the emergence of ‘new’ organisations or the disappearance of ‘old’ ones could not be tracked down in all cases.

Table 5: Comparative overview of national agriculture employer organisations / business associations identified in 2015 and 2022

Member State	Change in number of all sectoral employer organisations compared with the previous representativeness study	Change factors ⁽³⁾
AT	–1	Organisational factors / loss of members
BE	+1	Structural factors
BG	–1	Structural factors
CY	+2	Organisational factors
CZ	–1	Organisational factors
DE	–2	n.d.
DK	0	
EE	0	
EL	0	
ES	–2	n.d.
FI	–1	Organisational factors / loss of members
FR	+2	Organisational factors
HR	–1	Organisational factors / loss of members
HU	–2	n.d.
IE	–1	Organisational factors / loss of members
IT	–3	n.d.
LT	0	
LU	0	
LV	0	
MT	0	
NL	–3	n.d.
PL	–2	Organisational factors / loss of members
PT	+3	Structural factors
RO	+1	Organisational factors
SE	0	
SI	0	
SK	0	

Notes: n.d., data not available.

Sources: Network of Eurofound Correspondents, 2015 and 2022.

⁽³⁾ A detailed explanation of the factors explaining the changes in the number of organisations at the national level is available in Table 31 in the Annex.

2. European sectoral social dialogue in the agriculture sector

The agriculture European sectoral social dialogue committee (ESSDC) was set up in 1999 at the request of EFFAT on the employees' side and GEOPA-COPA on the employers' side. The agriculture ESSDC replaced the Joint Committee on Social Problems of Agricultural Workers, established formally by Commission Decision 74/442/EEC in July 1974 but informally active since the 1960s. The joint committee was set up at that time to address and improve the social problems faced by agricultural workers within the European Economic Community, highlighting the pivotal role agriculture has held and continues to hold in the European economy.

EFFAT in its present form was created in 2000 through a merger of two trade union federations: the European Committee of Food, Catering and Allied Workers' Unions within the International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (ECF-IUF) and the European Federation of Agricultural Workers' Unions (EFA) ⁽⁴⁾. The ECF-IUF and EFA were both founded in 1958 (Degryse, 2013, p. 87). In addition to the ESSDC of the agriculture sector, EFFAT also conducts European sectoral social dialogue in the sectors of food and drink; sugar manufacturing; hotels, restaurants and cafes (Horeca); and contract catering ⁽⁵⁾.

According to its website, GEOPA-COPA is the employers' group of professional agricultural organisations in the European Union. GEOPA-COPA was created in 1993. GEOPA-COPA's members are national agricultural organisations that are members of COPA or authorised by COPA to become members of GEOPA-COPA, and that are entitled to negotiate collective agreements at the national level. In the previous representativeness study for the sector (Eurofound, 2016), the assessment of representativeness included GEOPA-COPA, as was the case in the first representativeness study for the agriculture sector, published in 2007 (Eurofound, 2007). COPA represents the interests of EU agricultural producers, and its members comprise professional agricultural organisations that are employer organisations / business associations rather than individual enterprises. GEOPA-COPA, which was described in the previous representativeness study as COPA's employer group, specialises in dealing with employer interests and social dialogue, as distinct from the interests of farmers in other policy areas. According to the previous representativeness study, both GEOPA-COPA and COPA also organised national associations of cooperatives, even though most of them are affiliated to the General Confederation of Agricultural Cooperatives (COGECA), an organisation closely tied to COPA. During the consultation stages assessing the preliminary data used for drafting this report, representatives of GEOPA-COPA indicated that, while GEOPA and COPA share many members at the national level, not all members of COPA are members of GEOPA and vice versa. As only the national-level organisations affiliated to GEOPA are social partner organisations, the EU-level organisation provided the list of the GEOPA members to be assessed in the framework of this study. Given that the official name of the employer organisation participating in the ESSDC for agriculture sector is

⁽⁴⁾ EFA was a European trade union federation that existed from 1970 until its merger with the ECF-IUF to form EFFAT. EFA represented the interests of agricultural workers across Europe, advocating on issues such as working conditions, wages and social protection. For more information, see https://eu-cap-network.ec.europa.eu/index_en.

⁽⁵⁾ For more information, see <https://effat.org/mission/>.

GEOPA-COPA, as confirmed by the list of social partner organisations to be consulted under Article 154 of the TFEU ⁽⁶⁾, this approach might not seem straightforward; however, based on the membership list provided for data collection, and based on the information collected by the Network of Eurofound Correspondents, the representativeness of GEOPA-COPA will be assessed on the basis of the national-level members of GEOPA.

Based on the analysis of the documents available on the agriculture ESSDC web page, since the formal establishment of the ESSDC in its current format in 1999, over 20 texts have been agreed and published by the representative social partners. The minutes of the ESSDC meetings indicate that EFFAT has represented the workers since its formation in 2000, while GEOPA-COPA was listed as representing the employers until 2021. Since May 2022, the joint positions of the ESSDC have been signed by GEOPA on the employers' side.

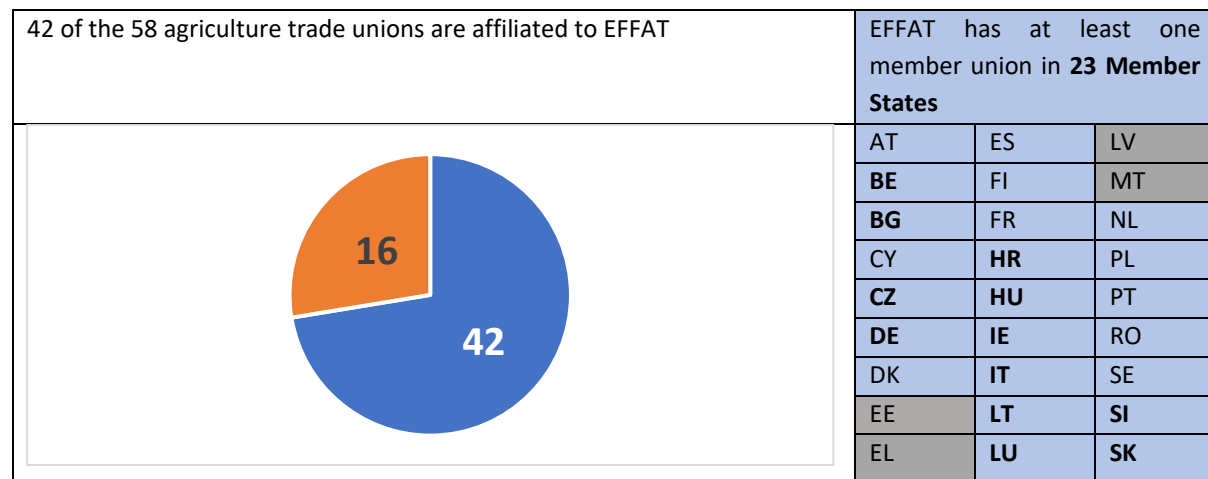
The agriculture ESSDC has covered a wide range of topics, including aspects related to health and safety standards and practices, accident prevention, developing vocational training and the provision of continuous training, access to effective social protection, improving working conditions and working time, ensuring decent working conditions for all categories of workers, managing the impact of the demographic change, addressing the impact of climate change and ensuring balanced just transition policies, and encouraging social dialogue as the most efficient tool to achieve these objectives. These topics were also the subject of the over 20 joint opinions reached by EFFAT and GEOPA-COPA in the Joint Committee on Social Problems of Agricultural Workers between 1978 and 1997. A complete overview of all joint opinions and a general overview of the activity of the ESSDC for agriculture can be found in Table 37 in the Annex.

⁽⁶⁾ For more information, see <https://webgate.ec.europa.eu/circabc-ewpp/d/d/workspace/SpacesStore/d02c92c4-43c2-4dab-b7bc-3339445836ef/file.bin>.

3.EFFAT

EFFAT was established in its current form in December 2000. The membership-based representativeness of EFFAT is summarised in the scoreboard (Figure 8). This illustrates that 42 of the 58 sector-related trade unions (72 %) in 23 Member States are affiliated to EFFAT ⁽⁷⁾.

Figure 8: Scoreboard of the representativeness of EFFAT in the agriculture sector in the EU-27, 2022



Notes: The blue part of the chart corresponds to the number of sectoral trade unions affiliated to EFFAT out of the total number of unions in the sector. Blue-shaded cells indicate Member States in which EFFAT has at least one affiliated sectoral trade union. Bold font is used for Member States in which the only or all sectoral trade unions are affiliated to EFFAT. Grey-shaded cells indicate Member States in which there is no trade union organising workers in the sector.

Source: Table 6.

The share of the trade union members in the sector represented by the trade unions affiliated to EFFAT cannot be exactly assessed, since membership data for several sector-related trade unions are missing. However, according to the scarce data available, it can be assumed that the finding of the previous representativeness study from 2016, which showed that two thirds of the 27 trade unions that had provided data had a sectoral density lower than 10 %, are probably still valid. This is because many sector-related trade unions have a membership domain that is sectionalist relative to the sector, which means that their domain covers only some of the agriculture sector. When calculating the share of the total EU workforce in the agriculture sector represented by the trade unions affiliated to EFFAT, some major difficulties must be borne in mind. First, some sectoral unions organise only dependent employees, while other unions also organise self-employed workers. A comparison of the number of union members with the total EU workforce in agriculture may therefore be misleading. Second, there are different methods for measuring the EU agricultural

(7) It should be noted that EFFAT indicated during the reviewing stages of this study in early 2026 that another Polish organisation, Krajowy Sekretariat Przemysłu Spożywczego i Rolnictwa NSZZ Solidarność (KSPSR NSZZ Solidarność) – a long-standing member of EFFAT in the food and tobacco sector – started representing workers in the agriculture sector in late 2024 / early 2025 following the merger of union structures within KSPSR NSZZ Solidarność. As this merger happened after the data collection was finalised, KSPSR NSZZ Solidarność is not included in the report as an EFFAT member, as its membership data could not be checked by the Network of Eurofound Correspondents.

workforce (see Section 1.2), depending on whether the concept of a ‘regular agricultural labour force’ or that of ‘employment’ is deployed. Third, as indicated above, for many sector-related trade unions, membership data were not provided to the Network of Eurofound Correspondents during data collection. Considering all these caveats, the share of trade union members of EFFAT-affiliated unions in proportion to the total EU workforce in agriculture can be estimated to be at least 3.9 % according to Eurostat’s ‘regular agricultural labour force data’ or at least 7.9 % according to Eurostat’s ‘employment data’. Noting that for some large Member States, such as France, the Netherlands, Poland, Romania and Spain, membership data are lacking for all or at least some trade unions, these figures may be starkly underestimated.

Table 6 indicates that in 19 of the 27 Member States the largest, or only, sector-related trade union is affiliated to EFFAT. Moreover, in most Member States the number of members of all sectoral trade unions comes close to or is identical to the number of members of EFFAT-affiliated trade unions – either because the only existing sectoral trade union(s) is/are affiliated to EFFAT or because the strongest unions in the sector of a Member State in terms of membership are EFFAT members. Only in Austria, Finland and Romania (of all Member States with available data) are there trade unions with a significant number of members not affiliated to EFFAT. In the case of Austria, the strongest organisation representing the interests of agriculture employees is the non-affiliated LAK, which is a chamber with compulsory membership rather than a trade union in a narrow sense.

There are three Member States with more than one sector-related trade union where all such unions are affiliated to EFFAT: Belgium, Bulgaria and Italy. In nine Member States with only one sector-related trade union – Croatia, Czechia, Germany, Hungary, Ireland, Lithuania, Luxembourg, Slovakia and Slovenia – this organisation is affiliated to EFFAT. This means that, altogether, in 12 of the 23 Member States where there is at least one sector-related trade union, all national-level unions are EFFAT members.

The absolute number of sector-related trade unions identified for the purpose of this study has decreased by four compared with the previous representativeness study on the agriculture sector in 2016. This reduction results from several structural and organisational reasons. Structurally, the current study is less comprehensive in terms of sector definition, in that forestry and logging activities are not part of it, while in the previous study some organisations organising forestry workers were included. For instance, GÖD of Austria (which was included in the 2016 study), organising the public sector and forestry workers, was not considered in this study because its membership domain is not related to agriculture as defined for the purpose of this study. In terms of organisational changes, in some Member States former sector-related trade unions merged or were incorporated into larger entities (e.g. in Finland ⁽⁸⁾) or lost their role as signatory party to collective bargaining (e.g. in Italy, Luxembourg, Malta), whereas in other Member States new trade unions considered representative in the sector emerged (e.g. in Romania).

⁽⁸⁾ In the previous representativeness study, the trade unions PL and MTJL were listed as EFFAT affiliates. During the data collection for the current representativeness study, the Network of Eurofound Correspondents indicated that PL has ceased its activity, and its remaining membership was incorporated into Teollisuusliitto – a trade union representing industry workers, not agriculture. MTJL is a member union of Pro, a trade union included in the current study.

Table 6: Membership strength of sectoral trade unions affiliated to EFFAT, 2022

Member State	Trade unions affiliated to EFFAT / total number of trade unions	Including the largest	Including the second largest	Number of members of all sectoral trade unions in the Member State	Number of members of trade unions affiliated to EFFAT
AT	2/4	No	Yes	At least 42 000	3 000
BE	5/5	Yes	Yes	n.d.	n.d.
BG	2/2	Yes	Yes	5 350	5 350
CY	1/3	Yes	No	4 530	2 900
CZ	1/1	Yes	n/a	10 000	10 000
DE	1/1	Yes	n/a	60 000	60 000
DK	1/2	Yes	No	At least 12 000	12 000
EE	0/0	n/a	n/a	n/a	n/a
EL	0/0	n/a	n/a	n/a	n/a
ES	3/5	Yes	n.d.	n.d.	n.d.
FI	2/4	Yes	No	4 580	2 020
FR	5/6	Yes	Yes	At least 6 470	At least 4 970
HR	1/1	Yes	n/a	6 200	6 200
HU	1/1	Yes	n/a	4 430	4 430
IE	1/1	Yes	n/a	n.d.	n.d.
IT	4/4	Yes	Yes	At least 541 000	At least 541 000
LT	1/1	Yes	n/a	390	390
LU	1/1	Yes	n/a	n.d.	n.d.
LV	0/0	n/a	n/a	n/a	n/a
MT	0/0	n/a	n/a	n/a	n/a
NL	2/4	Yes	Yes	n.d.	n.d.
PL	1/2	n.d.	n.d.	n.d.	n.d.
PT	1/2	No	Yes	1 100 permanent members	800
RO	2/3	No	Yes	At least 6 000	At least 4 000
SE	2/3	Yes	Yes	At least 10 600	10 600
SI	1/1	Yes	n/a	2 000	2 000
SK	1/1	Yes	n/a	1 135	1 135
EU-27	42/58	'Yes' in 19 MSs	'Yes' in 9 MSs	At least 717 785 (*)	At least 670 795 (*)

(*) Given the number of trade unions that did not provide membership data, or only provided estimates, the calculated totals should be treated with caution.

Notes: MS, Member State; n/a, not applicable; n.d., data not available. Due to data unavailability, trade union density cannot be calculated.

Source: Network of Eurofound Correspondents, 2022.

3.1. Sector-relatedness of EFFAT member organisations in the agriculture sector

Of the total of 58 sector-related trade unions, between 41 and 44 represent workers in each of the various parts/activities of the agriculture sector, that is, crop growing and plant propagation, animal production, mixed farming and support activities to agriculture (Table 7). About three quarters of the trade unions in each of these subsectors are EFFAT member unions. However, it is worth noting that no data on subsector coverage have been provided for a few unions. Animal production is the activity / part of the sector most represented by the total number of sectoral trade unions, but least represented by the trade unions affiliated to EFFAT.

Of the 23 Member States with sectoral trade unions affiliated to EFFAT, there are 20 with at least one EFFAT-affiliated trade union active in each subsector.

Table 7: Sector-relatedness of EFFAT members in terms of sector activities, 2022

NACE code	Specific activities / types of production in the agriculture sector	Total number of trade unions in these activities	EFFAT member unions	Number of Member States with affiliated trade unions organising these activities out of all Member States with unions in the sector
01.1, 01.2, 01.3	Crop growing and plant propagation	41 ^(a)	31 (76 %) ^(c)	19/20
01.4	Animal production	44 ^(a)	32 (73 %) ^(c)	19/20
01.5	Mixed farming	43 ^(a)	33 (77 %) ^(c)	19/20
01.6	Support activities to agriculture	43 ^(a)	33 (77 %) ^(c)	19/20
Total		50 ^(b)	37 (74 %) ^(c)	20/21

^(a) No data available for five trade unions.

^(b) No data available for four trade unions.

^(c) No data available for two trade unions.

Notes: Due to data unavailability, the share of sectoral workforce in each of the sector's activities cannot be calculated.

Source: Network of Eurofound Correspondents, 2022.

Of the 58 sector-related trade unions under consideration, more than half organise seasonal workers and/or employees working in cooperatives (31 and 37, respectively) (Table 8). Some 25 of the unions represent workers employed by subcontractors, 21 organise cross-border workers, 17 each organise posted workers and non-salaried workers, 8 do so with farm owners without salaried employees and 7 represent farm owners with salaried employees. Trade unions affiliated to EFFAT are over-represented among all trade unions that organise one or more of the abovementioned categories of workers. In particular, this holds true of unions organising cross-border workers (95 % of them are affiliated to EFFAT), posted workers and non-salaried employees (88 % of each are EFFAT members).

Farm owners with no salaried employees and employees working in cooperatives are least represented by EFFAT-affiliated trade unions (75 % and 76 %, respectively).

In terms of Member States with sectoral trade unions representing these categories of workers, in more than half of the EU-27, unions could be found that organise seasonal workers and employees working in cooperatives (each found in 16 Member States); in almost all of them (15 in both instances), there is at least one trade union affiliated to EFFAT representing these workers. There are 11 Member States that have EFFAT-affiliated unions organising cross-border workers and 11 Member States that have such unions for workers employed by subcontractors. In only a small minority of Member States could trade unions (most of them affiliated to EFFAT) be identified that represent posted workers, farm owners (irrespective of whether they employ salaried employees or not) and/or non-salaried employees.

Table 8: Types of workers organised by trade unions, 2022

Types of workers	Total number of trade unions organising the category	Number of trade unions (and share) affiliated to EFFAT	Number of Member States with affiliated trade unions organising these workers out of all Member States with unions representing these workers
Seasonal workers	31 ^(a)	26 (84 %) ^(d)	15/16
Posted workers	17 ^(b)	15 (88 %) ^(d)	7/7
Cross-border workers	21 ^(b)	20 (95 %) ^(d)	11/11
Workers employed by subcontractors	25 ^(b)	21 (84 %) ^(d)	11/11
Farm owners (with no salaried employees)	8 ^(c)	6 (75 %) ^(d)	3/5
Farm owners (with salaried employees)	7 ^(c)	6 (86 %) ^(d)	3/4
Non-salaried employees	17 ^(b)	15 (88 %) ^(e)	7/8
Employees working in cooperatives	37 ^(c)	28 (76 %) ^(d)	15/16

^(a) No data available for five trade unions.

^(b) No data available for six trade unions.

^(c) No data available for five trade unions.

^(d) No data available for two trade unions.

^(e) No data available for three trade unions.

Source: Network of Eurofound Correspondents, 2022.

Table 9 shows the distribution of the numbers of trade unions affiliated to EFFAT that organise agricultural workers across the different company and/or farm size groups. Workers in each of the listed size groups are represented by between 39 and 43 of the 58 sector-related trade unions. EFFAT-affiliated trade unions organise nearly two thirds of the smaller groups and account for nearly three quarters of the trade unions representing larger employers. About half of the Member States

have trade unions affiliated to EFFAT that organise workers employed by farms with up to nine employees. By contrast, in more than half of the Member States, EFFAT-affiliated trade unions organise employees working in larger companies with 10 or more employees.

Table 9: Number (and share) of agriculture trade unions affiliated to EFFAT with members in different company/farm size groups, 2022

Number of employees	Total number of trade unions	Number (and percentage) of EFFAT-affiliated trade unions	Number of Member States with affiliated trade unions organising workers of these company size groups out of all Member States with unions representing these workers
1 or 2 (very small farms)	39 ^(a)	27 (69 %) ^(b)	13/15
3–9 (small farms)	39 ^(a)	27 (69 %) ^(b)	14/15
10–49 (large farms)	43 ^(a)	32 (74 %) ^(b)	17/18
50 or more (very large agricultural companies)	42 ^(a)	32 (76 %) ^(b)	19/20

^(a) No data available for six trade unions.

^(b) No data available for three trade unions.

Source: Network of Eurofound Correspondents, 2022.

3.2. Role in the Member States' sectoral industrial relations landscape

Commission Decision 98/500/EC of 1998, in Article 1(b), refers to three criteria to be assessed to determine whether social partner organisations (in this case, trade unions) are representative. These criteria relate to:

- whether the affiliated sectoral trade unions are an integral and recognised part of the sectoral social dialogue structures in the Member State, by being involved in bipartite or tripartite social dialogue or paritarian organisations, or by being consulted by government institutions ⁽⁹⁾;
- the extent to which affiliated sectoral trade unions have the capacity to negotiate agreements determining the working conditions of the sectoral workforce – in other words, whether they are involved in collective bargaining – and the proportion of the workforce that is covered by collective bargaining;
- the number of affiliated sectoral trade unions that are considered representative in the national industrial relations setting of the Member State, and the number of Member States in which this is the case.

⁽⁹⁾ In the context of this study, bipartite social dialogue is defined as dialogue between trade unions and employer organisations, while tripartite social dialogue is dialogue among trade unions, employer organisations and government representatives. Bilateral consultations are between the government and trade unions, and/or between the government and employer organisations. Each configuration involves mutual recognition.

3.2.1. Integral and recognised participation in Member States' social dialogue structures

Table 10 shows that sector-related trade unions affiliated to EFFAT are more often (i) involved in bipartite or tripartite sectoral social dialogue, (ii) affiliated to a national trade union confederation and (iii) consulted by the government on sector-related matters than their unaffiliated counterparts. This is despite the fact that unaffiliated trade unions that are involved in sector-related collective bargaining were required to be considered in this study. Nevertheless, EFFAT affiliation appears to be more common for unions that are an integral part of a Member State's social dialogue structures than unions engaged in collective bargaining at the company or sector level.

It is important to note that a Member State's social dialogue practices do not necessarily require formal social dialogue structures in the form of joint bodies or the like. Social dialogue may also be effective in rather informal settings, given that the social partners meet regularly. In Member States such as Austria, Cyprus, Germany, Lithuania and Sweden, there are no formal social dialogue bodies (at least in agriculture); nevertheless, social dialogue works quite well in these Member States.

However, many Member States do record social dialogue bodies in the agriculture sector, in the forms of the various sectoral joint committees of Belgium; the Branch Council for Tripartite Cooperation at the Ministry of Agriculture, Food and Forestry of Bulgaria; the Tripartite Agricultural Working Environment Committee and the Tripartite Professional Committee for Vocational Training in Agriculture of Denmark; the tripartite body 'Eats', with the aim of empowering the agri-food chain actors through social dialogue, in Italy; and a series of sectoral bipartite bodies dealing with issues such as employment, vocational training, supplementary health and pension schemes, collective bargaining and the financing of social dialogue in France.

In addition, in some Member States paritarian organisations can be found, dealing with topics such as (un)employment and paid holiday schemes, pension funds, and vocational education and training, as well as healthcare and provident funds (e.g. in Belgium, Italy and the Netherlands).

Table 10: Trade unions involved in national social dialogue, 2022

	Involved in bipartite or tripartite sectoral social dialogue	Affiliated to a national confederation	Consulted by the government on sector-related matters
Total number of agriculture trade unions (share of the total number of 58 identified unions)	39 (67 %) ^(a)	45 (78 %) ^(c)	40 (69 %) ^(d)
Number of Member States	21	23	21
Number of trade unions affiliated to EFFAT (share of the total number of 42 affiliated unions)	31 (74 %) ^(b)	37 (88 %) ^(c)	31 (74 %) ^(e)
Number of Member States	19	23	21

^(a) No data available for 10 trade unions.

^(b) No data available for six trade unions.

^(c) No data available for three trade unions.

^(d) No data available for 11 trade unions.

^(e) No data available for seven trade unions.

Source: Network of Eurofound Correspondents, 2022.

3.2.2. Capacity to negotiate collective bargaining agreements

As outlined above (Figure 8), in 23 out of the 27 Member States at least one sector-related trade union can be identified. Of these 23 Member States, 21 record at least one sectoral union involved in sector-related collective bargaining, in the form of either multi-employer bargaining or single-employer bargaining, or a combination of both (Table 11). Of all 58 sector-related trade unions identified for the purpose of this study, 56 (97 %) are involved in some form of collective bargaining related to the agriculture sector. Only two trade unions do not engage in any form of collective bargaining, that is, LZUDPSF of Lithuania and OGB-L of Luxembourg. Since both unions are affiliated to EFFAT, the share of trade unions that engage in sector-related collective bargaining affiliated to EFFAT is slightly lower (95 %) than the share of trade unions involved in collective bargaining out of all sectoral unions.

Among the 42 trade unions affiliated to EFFAT, there are more that are involved in multi-employer bargaining (including both sector-level and cross-sectoral bargaining) (88 %) than those that engage in single-employer bargaining (71 %). Clearly more than half of the sector-related trade unions affiliated to EFFAT (26 out of 42) are involved in both single-employer and multi-employer bargaining simultaneously (Table 12).

While EFFAT-affiliated trade unions engaged in collective bargaining cover 21 Member States (and thus the vast majority of the 23 Member States recording sector-related trade unions), trade unions involved in multi-employer bargaining and those engaged in single-employer bargaining each cover 19 Member States.

Table 11: Trade unions' involvement in collective bargaining, 2022

	All unions	Affiliated to EFFAT		
	Total number of agriculture sector trade unions involved in any collective bargaining	Number of EFFAT member unions involved in any collective bargaining (share of the total number of 42 affiliated unions)	Number of EFFAT member unions involved in bargaining at ⁽¹⁰⁾	
			Sector level (multi-employer)	Company level (single-employer)
Number of trade unions (share of the total number of 58 identified unions)	56 (97 %)	40 (95 %)	37 (88 %)	30 (71 %) ^(b)
Number of Member States	21	21	19	19
	AT, BE, BG, CY, CZ, DE, DK, ES, FI, FR, HR, HU, IE, IT, NL, PL, PT, RO, SE, SI, SK	AT, BE, BG, CY, CZ, DE, DK, ES, FI, FR, HR, HU, IE, IT, NL, PL, PT, RO, SE, SI, SK	AT, BE, CY, CZ, DE, DK, ES, FI, FR, HU, IE, IT, NL, PL, PT, RO, SE, SI, SK	AT, BE, BG, CY, CZ, DE, DK, ES, FI, FR, HR, IE, NL, PL, PT, RO, SE, SI, SK
Member States in which none of the agriculture sector trade unions are involved in any collective bargaining ^(a)	LT, LU	LT, LU		

^(a) In Estonia, Greece, Latvia and Malta, there are no sector-related trade unions.

^(b) Data on involvement in collective bargaining were not available for one trade union.

Source: Network of Eurofound Correspondents, 2022.

Table 12 shows the list of the sectoral trade unions' involvement in collective bargaining related to the agriculture sector, differentiated by type of collective bargaining (sector-level bargaining versus company-level bargaining) and (non-)membership of EFFAT. In addition, the table indicates the individual unions' collective bargaining strength in the sector, by displaying each union's collective bargaining coverage of the sector's workforce, that is, the proportion of the agriculture sector's workforce covered by the collective agreements concluded by each individual trade union.

The question of whether there is a difference between the collective bargaining coverage of EFFAT-affiliated trade unions and unaffiliated trade unions cannot be conclusively answered, due to the lack of data for many unaffiliated unions. Data on collective bargaining coverage were available for only 5 out of the 16 trade unions not affiliated to EFFAT, which makes the comparison unreliable.

However, from the data available from the EFFAT affiliates, it can be inferred that they tend to have strong bargaining capacities, in that they cover high shares of the sectoral workforce in their respective Member States. Some 22 of the 35 EFFAT-affiliated trade unions for which data on their collective bargaining coverage are available record a coverage of at least 80 % of the sectoral

⁽¹⁰⁾ The two levels of bargaining are not mutually exclusive as a trade union can be involved in both sector-level and company-level collective bargaining simultaneously.

workforce. In Belgium, France, Italy and Slovenia, all the respective Member States' EFFAT affiliates cover the entire agricultural workforce when concluding sectoral collective agreements.

Table 12: Trade unions' involvement in collective bargaining and coverage levels, 2022

Member State	Trade union	Involvement in collective bargaining for the agriculture sector		Collective bargaining coverage of the agriculture workforce (%)
		Sector level	Company level	
AT	PRO-GE	Yes	Yes	n.d., estimated as high (~ 80)
AT	GPA	Yes	No	n.d., estimated as high (~ 80)
AT	LAK	Yes	Yes	n.d., estimated as close to 100
AT	LFB	Yes	Yes	n.d., estimated as high (~ 80)
BE	ABVV-FGTB Horval	Yes	Yes	100
BE	ACV-CSC – Food and services	Yes	Yes	100
BE	ACLVB-CGSLB	Yes	Yes	100
BE	ACV Puls	Yes	Yes	100
BE	ACV-CSC CNE	Yes	Yes	100
BG	FNSZ	No	Yes	5
BG	NFZGS Podkrepa	No	Yes	> 5
CY	Omepege – SEK	Yes	Yes	92.5
CY	Segdamelin – PEO	Yes	Yes	91
CY	Industrial – DEOK	Yes	Yes	87
CZ	OSPZV-ASO ČR	Yes	Yes	n.d.
DE	IG BAU	Yes	Yes	14
DK	3F	Yes	Yes	80
DK	Union of Agricultural and Supervisory Officers	Yes	No	n.d.
ES	UGT FICA	Yes	Yes	100
ES	CCOO Industria	Yes	Yes	90
ES	ELA	Yes	No	n.d.
ES	CIG	n.d.	Yes	n.d.
ES	LAB	Yes	n.d.	n.d.

Member State	Trade union	Involvement in collective bargaining for the agriculture sector		Collective bargaining coverage of the agriculture workforce (%)
		Sector level	Company level	
FI	Industrial Union	Yes	No	100
FI	Pro	Yes	Yes	0.3
FI	JHL	Yes	No	1
FI	Jyty	Yes	No	n.d.
FR	SNCEA / CFE-CGC	Yes	Yes	100
FR	CFTC-AGRI	Yes	Yes	100
FR	FGA-CFDT	Yes	Yes	100
FR	FGTA-FO	Yes	Yes	100
FR	FNAF-CGT	Yes	Yes	100
FR	UNSA2A	Yes	Yes	n.d.
HR	PPDIV	No	Yes	35
HU	Médosz	Yes	No	30
IE	SIPTU	Yes	Yes	70
IT	FLAI CGIL	Yes	No	100
IT	FAI CISL	Yes	No	100
IT	UILA UIL	Yes	No	100
IT	Confederia	Yes	No	100
LT	LZUDPSF	No	No	0
LU	OGB-L	No	No	0
NL	FNV	Yes	Yes	90
NL	CNV Vakmensen	Yes	n.d.	n.d.
NL	De Unie	Yes	n.d.	n.d.
NL	HZC	Yes	Yes	19
PL	ZZPR	Yes	Yes	n.d.
PL	NSZZ RI Solidarność ⁽¹¹⁾	Yes	No	n.d.

⁽¹¹⁾ NSZZ RI Solidarność is a small farmers' organisation that has indicated past affiliation to COPA, as confirmed by EFFAT during the reviewing stages of this study in early 2026. EFFAT also indicated in 2026 that another Polish organisation, Krajowy Sekretariat Przemysłu Spożywczego i Rolnictwa NSZZ Solidarność (KSPSR NSZZ Solidarność) – a long-standing member of EFFAT in the food and tobacco sector – started representing workers in the agricultural sector in late 2024 / early 2025 following the

Member State	Trade union	Involvement in collective bargaining for the agriculture sector		Collective bargaining coverage of the agriculture workforce (%)
		Sector level	Company level	
PT	Setaab	Yes	Yes	15
PT	Sintab	Yes	Yes	60
RO	FSA Terra	Yes	No	n.d.
RO	Agrostar	n.d.	Yes	n.d.
RO	Propact	No	Yes	n.d.
SE	Kommunal ⁽¹²⁾	Yes	Yes	Almost 100
SE	Unionen	Yes	Yes	n.d.
SE	Naturvetarna	Yes	n.d.	n.d.
SI	SKŽI	Yes	Yes	100
SK	OZ PP	Yes	Yes	5

Notes: n.d., data not available. Organisations in bold font are affiliated to EFFAT.

Source: Network of Eurofound Correspondents, 2022.

3.2.3. Representativeness status of EFFAT member organisations at the national level

Of the 55 sector-related trade unions for which data are available, the vast majority (52 or 90 %) are recognised as representative social partner organisations on behalf of the workers in the sector, based on legal/statutory requirements, mutual recognition of the social partners involved or both recognition criteria. The same holds true of the unions affiliated to EFFAT; of these, the same proportion (90 %) are recognised as representative of the workers in the agriculture sector (Table 13).

In terms of the coverage of Member States, in 22 Member States at least one union is a recognised representative according to national recognition criteria, irrespective of whether only EFFAT members are considered or all sector-related trade unions.

merger of union structures within KSPSR NSZZ Solidarność. As this merger happened after the data collection was finalised, KSPSR NSZZ Solidarność is not included in the report as an EFFAT member, as its membership data could not be checked by the Network of Eurofound Correspondents.

⁽¹²⁾ During the reviewing stages of this study in early 2026, EFFAT indicated that part of the agriculture section of Kommunal was in the process of moving to LIVS, a union representing food and agriculture workers. It is noteworthy that this development, announced in late 2025, was not yet completed by the time the current report was finalised and does not change the share of the agriculture workforce in Sweden affiliated to and represented by EFFAT; this thus has no impact on the representativeness of EFFAT in the agriculture sector.

Table 13: Representative status of EFFAT member organisations at the national level, 2022

	Recognised as representative based on national recognition criteria
Total number of agriculture sector trade unions (share of the total number of 58 identified unions)	52 (90 %) (*)
Number of Member States	22
Number of trade unions affiliated to EFFAT (share of the total number of 42 affiliated unions)	38 (90 %) (*)
Number of Member States	22

(*) No data available for one union in Spain and two unions in the Netherlands.

Source: Network of Eurofound Correspondents, 2022.

3.3. Adequate structures to ensure effective participation of its members

Of the 42 EFFAT-affiliated trade unions identified, at least 30 unions from 22 Member States pay affiliation fees to EFFAT for their members working in the agriculture sector. For 11 affiliates, no data have been provided, and for only 1 trade union, Setaab of Portugal, non-payment of fees has been explicitly confirmed. At least 20 trade unions affiliated to EFFAT from 13 Member States indicate that they are involved in the management bodies of EFFAT; 13 trade unions are not, and for the 9 remaining trade unions data are not available. Active involvement in EFFAT's working groups can be found for 24 unions from 18 Member States, while a significant number of unions report no available data (13 trade unions). There are only four trade unions in two Member States, Belgium and Spain, that indicate that they are involved in the EFFAT Small Farms Committee, which, as clarified by EFFAT during the reviewing stages of this study, is still active, despite having reduced activity in recent years. This might be the reason behind the indication by some of the trade unions contacted that they are not aware of their participation in the EFFAT Small Farms Committee (Table 14).

Table 14: Involvement of sectoral trade unions in the EFFAT bodies, 2022

Member State	Trade union	Involved in the management bodies of EFFAT	Paying affiliation fees to EFFAT for its workers/members in the agriculture sector	Actively involved in the working groups of EFFAT	Involved in the EFFAT Small Farms Committee
AT	PRO-GE	n.d.	Yes	n.d.	No
AT	GPA	No	Yes	No	No
BE	ABVV-FGTB Horval	Yes	Yes	Yes	Yes
BE	ACV-CSC – Food and services	Yes	Yes	Yes	Yes
BE	ACLVB-CGSLB	n.d.	n.d.	n.d.	n.d.
BE	ACV Puls	n.d.	n.d.	n.d.	n.d.
BE	ACV-CSC CNE	n.d.	n.d.	n.d.	n.d.
BG	FNSZ	Yes	Yes	Yes	No
BG	NFZGS Podkrepa	Yes	Yes	Yes	No
CY	Omepege – SEK	No	Yes	Yes	No
CZ	OSPZV-ASO ČR	Yes	Yes	No	No
DE	IG BAU	Yes	Yes	Yes	n.d.
DK	3F	Yes	Yes	Yes	No
ES	UGT FICA	Yes	n.d.	Yes	Yes
ES	CCOO Industria	Yes	Yes	Yes	Yes
ES	ELA	n.d.	n.d.	n.d.	n.d.
FI	Industrial Union	Yes	Yes	Yes	No
FI	Pro	No	Yes	No	No
FR	FNAF-CGT	No	Yes	Yes	No
FR	SNCEA / CFE-CGC	n.d.	n.d.	n.d.	n.d.
FR	CFTC-AGRI	Yes	Yes	Yes	n.d.
FR	FGA-CFDT	Yes	Yes	Yes	No
FR	FGTA-FO	n.d.	n.d.	n.d.	n.d.
HR	PPDIV	Yes	Yes	Yes	No
HU	Médosz	No	Yes	Yes	No
IE	SIPTU	Yes	Yes	Yes	No
IT	FLAI CGIL	Yes	n.d.	n.d.	n.d.
IT	FAI CISL	Yes	n.d.	n.d.	n.d.
IT	UILA UIL	Yes	Yes	n.d.	n.d.

Member State	Trade union	Involved in the management bodies of EFFAT	Paying affiliation fees to EFFAT for its workers/members in the agriculture sector	Actively involved in the working groups of EFFAT	Involved in the EFFAT Small Farms Committee
IT	Confederia	Yes	n.d.	n.d.	n.d.
LT	LZUDPSF	No	Yes	Yes	No
LU	OGB-L	No	Yes	No	n.d.
NL	FNV	Yes	Yes	Yes	n.d.
NL	CNV Vakmensen	No	Yes	Yes	No
PL	ZZPR	No	Yes	Yes	No
PT	Setaab	No	No	No	No
RO	FSA Terra	No	Yes	Yes	No
RO	Agrostar	n.d.	n.d.	n.d.	n.d.
SE	Kommunal ⁽¹³⁾	Yes	Yes	Yes	n.d.
SE	Unionen	n.d.	Yes	n.d.	n.d.
SI	SKŽI	No	Yes	Yes	No
SK	OZ PP	No	Yes	Yes	No
EU-27	42 EFFAT members	20 trade unions in 13 Member States	30 trade unions in 22 Member States	24 trade unions in 18 Member States	4 trade unions in 2 Member States

Note: n.d., data not available.

Source: Network of Eurofound Correspondents, 2022.

3.4. Negotiation capacity of EFFAT

As stated in the Introduction, 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 must represent organisations that are themselves an integral and recognised part of Member States' social partner structures (as covered in Section 3.2.1), that they must have the capacity to negotiate labour agreements and that they are representative of several Member States. 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' (TFEU, Article 155); 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 applies the criterion of the 'capacity to negotiate' to both the EU-level partner associations and, in a bottom-up approach, the national organisations in order to assess their

⁽¹³⁾ During the reviewing stages of this study, EFFAT indicated that the agriculture section of Kommunal has partly moved to LIVS, a union representing food and agriculture workers.

relevance. Following these assessments, the standard Eurofound methodology for assessing the criteria of being an ‘integral part of Member State industrial relations’ and having the ‘capacity to negotiate’ applies the ‘capacity to negotiate agreements’ criterion at both the EU and national levels. The mandate / mandating procedure can be either **statutory** (i.e. laid down in the constitution of the organisation or annexed to it) or **non-statutory** (i.e. laid down in secondary documents, such as rules of procedure, memoranda of understanding and/or ad hoc decisions by the governing bodies of the organisation). Finally, in the absence of the abovementioned procedures, management and labour may have an **intrinsic capacity to negotiate** as proven by their practical involvement in binding agreements, declarations and joint opinions, among other means.

According to Article 2 of EFFAT’s statutes, dating from 2024, one of the aims of the organisation is ‘to defend and improve individual and collective fundamental rights as defined among others in the Charter of Fundamental Rights of the EU and the [International Labour Organization] conventions; to improve living and working conditions of workers employed in the EFFAT / IUF Europe sectors; to promote a sustainable policy of the sectors as a real source of wealth and a necessary basis for growth, innovation, research, development, and more and better jobs’ (EFFAT, 2024). Article 3 lists the promotion of ‘social dialogue at all levels and in particular collective bargaining at [the] national and sectoral level[s]’ among the organisational tasks, while Article 4 mentions ‘negotiating/bargaining on behalf of its Member Organisations in the social dialogue and/or in transnational negotiations with companies’ among the organisation’s roles (EFFAT, 2024).

Article 17(q) of the EFFAT statutes clearly defines the duties of the EFFAT Executive Committee as regards negotiations, in terms of the composition and mandate of a negotiation delegation, how the Executive Committee is to be kept informed and how it decides on draft texts and agreements. In conclusion, EFFAT has a **statutory provision to negotiate and conclude sectoral agreements**.

3.5. EFFAT members’ effective participation in the ESSDC

Commission Decision 98/500/EC from 1998, on the establishment of ESSDCs, stipulates in its Article 1(c) that European social partner organisations ‘shall have adequate structures to ensure their effective participation in the work of the Committees’. The adequacy of the structures to enable them to represent their members on the ESSDC, in European Commission consultations and in the negotiation of binding agreements has been analysed in the previous section. In this section, the effective participation of EFFAT’s members in ESSDC meetings is outlined. Based on data shared by the Directorate-General for Employment, Social Affairs and Inclusion, EFFAT delegates from 12 Member States were represented at least twice during the ESSDC meetings in the three-year interval analysed. Moreover, in the cases of Bulgaria, Czechia, Denmark, Germany, Lithuania and Slovenia – Member States with only one union organising the sector – these workers were represented in the ESSDC meetings (Table 15). In addition to the data provided by the Directorate-General for Employment, Social Affairs and Inclusion, further data provided by EFFAT shows that the affiliates from Hungary and Slovakia also attended the ESSDC meetings from 2023, making a total of 14. In another nine Member States, EFFAT has affiliates for the sector but these affiliates did not attend any ESSDC meetings between 2023 and 2025. These Member States are Croatia, Cyprus, Finland, Ireland, Luxembourg, the Netherlands, Poland, Portugal and Romania. It is noteworthy that the two EFFAT members from Romania and the one from Poland, Member States recording a high share of

the agriculture workforce both as a proportion of their national economies and as a proportion of the EU economy, did not participate in any of the ESSDC meetings from 2023 to 2025.

Table 15: Overview of EFFAT members' participation in agriculture ESSDC meetings between 2023 and 2025

Participation	Member States	Number of Member States
Member States with participating trade union delegates	AT (1/2), BE (1/5), BG, CZ, DE, DK , ES (2/3), FR (2/5), <i>HU</i> , IT (3/4), LT , SE (1/2), SI , <i>SK</i>	14 out of 23 in which EFFAT has members
Member States in which EFFAT has members, but no delegates participated between 2023 and 2025	CY, FI, HR, IE, LU, NL, PL, PT, RO	9

Note: Bold font used for Member States from which all the EFFAT-affiliated unions were represented. Italic font used for Member States whose proof of attendance was provided by EFFAT.

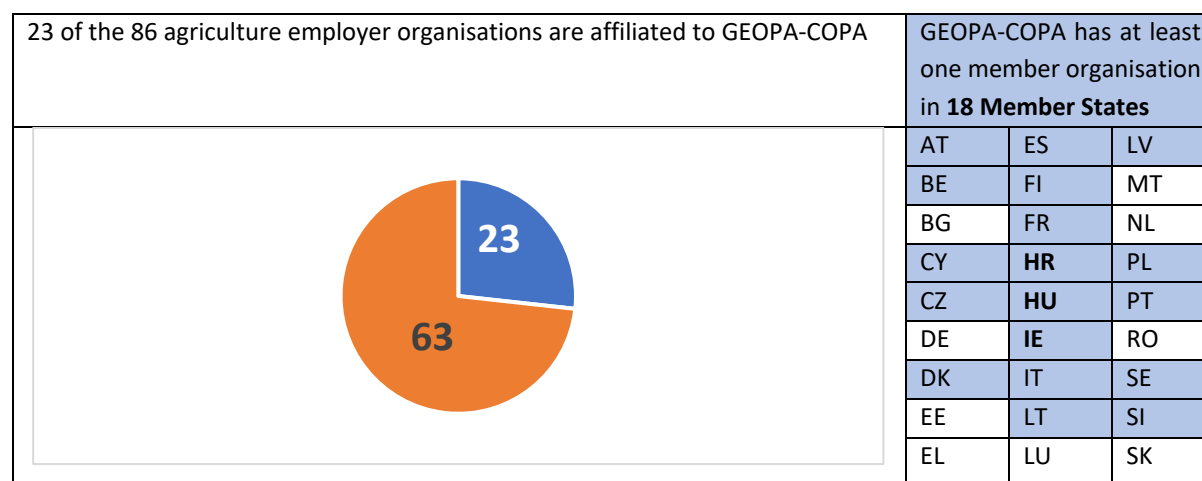
Sources: ESSDC attendance data provided by the European Commission; data from the Network of Eurofound Correspondents.

4. GEOPA-COPA

As mentioned in Chapter 2, since 2022 the joint positions of the agriculture ESSDC have been signed by GEOPA only on the employers' side, whereas prior to 2022, but after the formal establishment of the agriculture ESSDC in 1999, GEOPA-COPA was listed as representing the employers. The same chapter explains that only the national-level organisations affiliated to GEOPA are social partner organisations; thus the list of organisations provided by GEOPA-COPA for assessing representativeness in the framework of this study was the list of GEOPA members, with the request that the organisation only be referred to as 'GEOPA' in this study. However, given that the official name of the employer organisation participating in the ESSDC for the agriculture sector is 'GEOPA-COPA', as confirmed by the list of social partner organisations to be consulted under Article 154 of the TFEU ⁽¹⁴⁾, in this section, the official name GEOPA-COPA will be used.

The membership-based representativeness of GEOPA-COPA is summarised in the scoreboard in Figure 9. The figure illustrates on the left, in blue, that 23 of the 86 sector-related employer organisations and business associations (27 %) in 18 Member States are affiliated to GEOPA-COPA.

Figure 9: Scoreboard of the representativeness of GEOPA-COPA in the agriculture sector in the EU-27, 2022



Notes: The blue part of the chart corresponds to the number of sectoral employer organisations affiliated to GEOPA-COPA. Blue-shaded cells indicate Member States in which GEOPA-COPA has at least one affiliated sectoral employer organisation. Bold font is used for Member States in which the only sectoral employer organisation is affiliated to GEOPA-COPA. Cells with no shading indicate Member States in which none of the sectoral employer organisations are affiliated to GEOPA-COPA.

Source: Table 16.

The share of companies in the agriculture sector represented by employer organisations affiliated to GEOPA-COPA cannot be assessed exactly. This is because the methods used for counting members by employer organisations often differ from the methods used for official statistics by authorities such as Eurostat. Moreover, for many employer organisations, no member data have been provided. Nevertheless, when summing up – as far as data are available – the number of member companies

⁽¹⁴⁾ This list is available at <https://webgate.ec.europa.eu/circabc-ewpp/d/d/workspace/SpacesStore/d02c92c4-43c2-4dab-b7bc-3339445836ef/file.bin>.

of employer organisations affiliated to GEOPA-COPA across the EU-27 (see Table 16) and comparing this total with the number of companies in EU agriculture (about 9.1 million according to Eurostat), a rough estimate of this share can be calculated. Accordingly, at least 41 % of the EU-27 companies/farms are represented by employer organisations affiliated to GEOPA-COPA. Moreover, when comparing the number of companies represented and organised by all the identified employer organisations and business associations in a Member State's agriculture sector with the number of companies represented by employer organisations affiliated to GEOPA-COPA, it becomes clear that GEOPA-COPA members cover (almost) all companies organised and represented by all the sector-related employer organisations identified in 10 Member States: Austria, Croatia, Denmark, France, Hungary, Ireland, Italy, Lithuania, Poland and Slovenia. In the cases of Austria, Poland and Slovenia, full coverage in terms of not only all the companies affiliated to employer organisations and business associations, but also all the sector's companies as a whole, is due to mandatory membership in the context of each of these Member States' respective chamber systems. In four Member States (Cyprus, Czechia, Finland and Spain), the number of companies organised by GEOPA-COPA member organisations amounts to at least half of the number of companies organised by all the sector-related employer organisations and business associations in that Member State. In only three Member States, that is, Latvia, Portugal and Sweden, the corresponding share is lower, while for Belgium no information was provided. The remaining nine Member States do not record a GEOPA-COPA affiliate.

Another indicator of GEOPA-COPA member organisations' strength is their sectoral density in terms of the agriculture sector's workforce, namely the share of workers employed by companies organised by GEOPA-COPA member organisations as a percentage of the sector's total workforce per Member State. These data stem from estimates and/or calculations provided by the Network of Eurofound Correspondents. This share is 100 % in three Member States, Austria, Poland and Slovenia, because of their respective chamber systems being based on the mandatory membership of all sectoral companies – and the fact that the relevant chambers of these Member States are members of GEOPA-COPA. In five Member States, that is, Croatia, Denmark, Finland, France and Sweden, the percentage of the workforce employed by companies affiliated to GEOPA-COPA member organisations is higher than 50 % (but less than 100 %). In five other Member States (Cyprus, Czechia, Hungary, Italy and Portugal), this share is 50 % or less, while in Belgium, Ireland, Latvia, Lithuania and Spain these data are not available. There is no GEOPA-COPA affiliate in nine Member States (Bulgaria, Estonia, Germany, Greece, Luxembourg, Malta, the Netherlands, Romania and Slovakia).

While in nine Member States there are no GEOPA-COPA members, in most Member States (15) only one employer organisation affiliated to GEOPA-COPA can be identified. In three of these Member States (Croatia, Hungary and Ireland), the GEOPA-COPA affiliate is the only sector-related employer organisation identified. In the rest of these Member States, the GEOPA-COPA member forms part of a pluralist associational landscape of employer organisations and business associations. In Belgium, two employer organisations affiliated to GEOPA-COPA can be found, while Italy and Poland record three affiliated organisations. In this group of Member States, GEOPA-COPA affiliates coexist alongside other employer organisations and business associations not affiliated to GEOPA-COPA.

In 14 of the 18 Member States where at least one GEOPA-COPA affiliate exists, the largest sector-related employer organisation is affiliated to GEOPA-COPA. In Czechia, Finland and Latvia the

second-largest employer organisation is affiliated to GEOPA-COPA rather than the largest. This information is not available for Sweden.

The absolute number of sector-related employer organisations and business associations identified in the framework of this study decreased by 11 compared with the previous representativeness study on the agriculture sector in 2016. As already explained in the context of the trade union side (Chapter 3), the current study is less comprehensive in terms of sector demarcation, since forestry and logging activities are – in contrast to the 2016 study – not part of it. This may, from a structural point of view, have resulted in some employer organisations not being considered in this study if their membership domain is focused on these business activities. However, in many cases of employer organisations and business associations considered in the 2016 study, the reasons for their omission from the current study remains unclear. In some cases, employer organisations that were included in the 2016 study were not included in the current study because they are not involved in sectoral collective bargaining any longer and indicated they are not interested in participating in the study (as is the case for a few organisations in Bulgaria) or they are no longer affiliated to GEOPA-COPA or COGECA, members of which were included in the previous representative study, and have declined to participate (e.g. Czechia's ASZCR, Finland's Pellervo, and Ireland's ICOS). On the other hand, some new organisations had to be included in the current study since they emerged as new social partners (e.g. BFG-FBEP and AVBS in Belgium and some smaller employer organisations in Portugal) or have become members of COPA or COGECA in recent years (e.g. APCA and Coopération Agricole of France).

In this context, it is important to note that all employer organisations and business associations that are members of GEOPA-COPA or COGECA are to be included in the study, as they were included in the previous study of the sector in 2016, and thus comparative analysis is required. This is despite the fact that only GEOPA, as COPA's employer group, plays the role of social partner organisation on behalf of the agriculture sector's ESSDC. The reason for the inclusion COPA and COGECA member organisations in addition to GEOPA members is twofold. First, although GEOPA acts autonomously as the agriculture employers' voice in European sectorial social dialogue, it is explicitly mandated to do so by COPA. Second, although in formal terms COPA and COGECA are two distinct organisations, they are strongly interrelated, for instance by having merged their respective secretariats, thus sharing organisational structures and capacities.

Table 16: Membership strength of sectoral employer organisations affiliated to GEOPA-COPA, 2022

Member State	GEOPA-COPA affiliated employer organisations / total number of employer organisations	Including the largest	Including the second largest	Number of companies affiliated to all the sectoral employer organisations / business associations in the Member State	Number of companies affiliated to GEOPA-COPA members	Percentage of workforce in companies affiliated to a GEOPA-COPA member employer organisation (%)
AT	1/2	Yes	n/a	155 000	155 000	100
BE	2/4	Yes	Yes	n.d.	n.d.	n.d.
BG	0/2	n/a	n/a	n/a	n/a	n/a
CY	1/6	Yes	n/a	> 17 234	10 044	40–50
CZ	1/3	No	Yes	> 2 480	1 300	5
DE	0/3	n/a	n/a	> 300 000	n/a	n/a
DK	1/2	Yes	n/a	22 500	22 000	85–90
EE	0/3	n/a	n/a	> 8 000	n/a	n/a
EL	0/1	n/a	n/a	> 130 000	n/a	n/a
ES	1/7	Yes	n/a	> 483 000	250 000	n.d.
FI	1/4	No	Yes	> 97 705	47 000	60
FR	1/3	Yes	n/a	> 200 000	200 000	60
HR	1/1	Yes	n/a	1 500	1 500	70
HU	1/1	Yes	n/a	567	567	29
IE	1/1	Yes	n/a	73 000	73 000	n.d.
IT	3/6	Yes	n.d.	> 1 615 500	> 1 613 000	> 10
LT	1/4	Yes	n/a	6 170	6 000	n.d.
LU	0/1	n/a	n/a	800	n/a	n/a
LV	1/5	No	Yes	> 22 150	6 000	n.d.
MT	0/1	n/a	n/a	2 192	n/a	n/a
NL	0/3	n/a	n/a	> 36 800	n/a	n/a
PL	3/4	Yes	n/a	1 318 000	1 318 000	100
PT	1/10	Yes	n/a	3 124	1 500	6
RO	0/2	n/a	n/a	> 3 500	n/a	n/a
SE	1/2	n/a	n/a	141 879	1 879	54
SI	1/4	Yes	n/a	70 000	70 000	100

Member State	GEOPA-COPA affiliated employer organisations / total number of employer organisations	Including the largest	Including the second largest	Number of companies affiliated to all the sectoral employer organisations / business associations in the Member State	Number of companies affiliated to GEOPA-COPA members	Percentage of workforce in companies affiliated to a GEOPA-COPA member employer organisation (%)
SK	0/1	n/a	n/a	1 295	n/a	n/a
EU-27	23/86	'Yes' in 14 Member States	'Yes' in 4 Member States	> 4 712 396	> 3 776 790	n.d.

Note: n/a, not applicable; n.d., data not available.

Source: Network of Eurofound Correspondents, 2022.

4.1. Sector-relatedness of GEOPA-COPA member organisations in the agriculture sector

Of the 86 sector-related employer organisations and business associations, between 51 and 58 represent and organise companies in each of the various parts and activities of the agriculture sector, namely crop growing and plant propagation, animal production, and mixed farming (Table 17). Around 40 % of the employer organisations in each of the respective activities or subsectors are affiliated to GEOPA-COPA. However, it is worth noting that, for almost one third of the employer organisations and business associations, no data on their business activities have been provided. Crop growing is the most represented part of the sector based on the available data. However, all the organisations affiliated to GEOPA-COPA cover all three subsectors, except for Poland's FBZPR, for which full information has not been provided.

In at least 23 Member States, each of the subsectors is represented by at least one sector-related employer organisation or business association. In the 18 Member States with sectoral employer organisations affiliated to GEOPA-COPA, each of the subsectors is covered by the membership domain of one or more affiliated organisations, in that they represent employers in these subsectors.

Table 17: Sector-relatedness of GEOPA-COPA members in terms of sector activities, 2022

NACE code	Specific activities / types of production in the agriculture sector	Total number of employer organisations in these activities	GEOPA-COPA members	Number of Member States with affiliated employer organisations organising these activities out of all Member States with employer organisations organising these activities
01.1, 01.2, 01.3	Crop growing and plant propagation	58 ^(a)	23 (40 %)	18/25 ^(d)
01.4	Animal production	55 ^(a)	23 (42 %)	18/25 ^(d)
01.5	Mixed farming	51 ^(b)	22 (43 %) ^(c)	18/23 ^(e)
Total		60 ^(a, b)	23 ^(c)	18/20 ^(d, e)

^(a) No data available for 26 employer organisations.

^(b) No data available for 29 employer organisations.

^(c) No data available for one GEOPA-COPA member (FBZPR of Poland).

^(d) No data available for all employer organisations in two Member States (Bulgaria and Romania).

^(e) No data available for all employer organisations in four Member States (Bulgaria, Malta, Romania and Slovenia).

Source: Network of Eurofound Correspondents, 2022.

Table 18 shows the number of employer organisations affiliated to GEOPA-COPA that organise and represent companies/farms of different size groups, in terms of both the number of employees and the size of the cultivated farmland. Between 51 and 57 of the total of 86 sector-related employer organisations and business associations represent companies in each of the size groups in terms of

number of employees. In terms of the size of the farmland (in yards), the respective numbers are slightly lower (48 and 50 of the 86 employer organisations represent farms cultivating farmland of less than 40 yards squared or 40 yards squared or more, respectively). However, these figures should be treated with caution, since data have been provided for only about three quarters, or 72%, of organisations in terms of the number of employees and about 60 % of organisations in terms of the size of the farmland of the total of 86 sector-related employer organisations. GEOPA-COPA members organising companies of smaller size classes are represented among all employer organisations and business associations similarly to those organising companies of larger size classes. Again, these results should be treated with caution due to large proportions of missing data for organisations not affiliated to GEOPA-COPA.

In most Member States where at least one employer organisation is affiliated to GEOPA-COPA (of the 18 total), there is one or more organisations affiliated to GEOPA-COPA that (cumulatively) organise companies/farms of each size class, in terms of both the number of employees and the size of farmland.

Table 18: Number (and share) of agriculture employer organisations affiliated to GEOPA-COPA with members in different company/farm size groups, 2022

Number of employees / farm area in yards	Total number of employer organisations organising companies in this size group	Number of GEOPA-COPA members	Number of Member States with affiliated employer organisations organising companies in this size group out of all Member States with employer organisations organising companies in this size group
Farms without employees	51 ^(a)	20 (39 %) ^(e)	16/25 ^(g)
Farms with 1 or 2 employees	57 ^(b)	22 (39 %) ^(e)	18/25 ^(g)
Farms with 3–9 employees	56 ^(b)	22 (39 %) ^(e)	18/24 ^(g)
Farms with 10–49 employees	56 ^(b)	22 (39 %) ^(e)	18/23 ^(g)
Farms with 50 or more employees	53 ^(c)	21 (40 %) ^(e)	17/22 ^(g)
Farms under 40 yards in area	48 ^(d)	21 (44 %) ^(f)	18/24 ^(h)
Farms of 40 yards or more	50 ^(d)	21 (42 %) ^(f)	18/24 ^(h)

^(a) No data available for 21 employer organisations.

^(b) No data available for 23 employer organisations.

^(c) No data available for 22 employer organisations.

^(d) No data available for 36 employer organisations.

^(e) No data available for one GEOPA-COPA member (PFR of Poland).

^(f) No data available for two GEOPA-COPA members in Poland.

^(g) No data available for all employer organisations in two Member States (Bulgaria and Romania).

^(h) No data available for all employer organisations in three Member States (Bulgaria, Greece and Romania).

Source: Network of Eurofound Correspondents, 2022.

4.2. Role in the Member States' sectoral industrial relations landscape

Commission Decision 98/500/EC of 1998, in its Article 1(b), refers to three criteria to be assessed to determine whether social partner organisations (in this case, employer organisations) are representative. These criteria relate to:

- whether the affiliated sectoral employer organisations are an integral and recognised part of the sectoral social dialogue structures in the Member State, by being involved in bipartite or tripartite social dialogue or paritarian organisations, or by being consulted by government institutions ⁽¹⁵⁾;
- the extent to which affiliated employer organisations have the capacity to negotiate agreements determining the working conditions of the sectoral workforce – in other words, whether they are involved in collective bargaining – and the proportion of the workforce that is covered by collective bargaining;
- the number of affiliated sectoral employer organisations that are considered representative in the national industrial relations setting of the Member State, and the number of Member States in which this is the case.

4.2.1. Integral and recognised part of Member States' industrial relations structures

Table 19 shows that sector-related employer organisations affiliated to GEOPA-COPA are more often (i) involved in bipartite or tripartite sectoral social dialogue and (ii) consulted by the government on sector-related matters than their unaffiliated counterparts. This indicates that GEOPA-COPA affiliation may be a decisive factor for employer organisations being an integral part of Member States' social dialogue structures. The role of their collective bargaining involvement in this context is less clear. This is because – in contrast to the trade union side – organisations not affiliated to the sole actor involved in the European sectoral social dialogue on behalf of the employers (i.e. GEOPA-COPA) are not necessarily involved in the sector-related collective bargaining considered in the study. Rather, they may also be affiliated to COPA and/or COGECA without any collective bargaining involvement and thus be business associations rather than employer organisations.

The situation of formal versus informal social dialogue practices and settings has already been outlined in Section 3.2.1 and needs not be reiterated in the context of this chapter. The same holds true of the description of Member-State-specific social dialogue bodies and paritarian organisations in the agriculture sector.

⁽¹⁵⁾ In the context of this study, bipartite social dialogue is defined as dialogue between trade unions and employer organisations, while tripartite social dialogue is dialogue among trade unions, employer organisations and government representatives. Bilateral consultations are between government and trade unions, and/or between the government and employer organisations. Each configuration involves mutual recognition.

Table 19: Employer organisations involved in national social dialogue, 2022

	Involved in bipartite or tripartite sectoral social dialogue	Affiliation to a national confederation	Consulted by the government on sector-related matters
Total number of agriculture employer organisations (share of the total number of 86 identified employer organisations)	33 (38 %) (52 % ^(a))	17 (20 %) (22 % ^(c))	52 (60 %) (93 % ^(d))
Number of Member States	17	12	23
Number of employer organisations affiliated to GEOPA-COPA (share of the total number of 23 affiliated employer organisations)	15 (65 %) (71 % ^(b))	3 (13 %)	22 (96 %) (100 % ^(e))
Number of Member States	13	3	17

^(a) Share adjusted for 22 employer organisations without information provided.

^(b) Share adjusted for two GEOPA-COPA members without information provided.

^(c) Share adjusted for eight employer organisations without information provided.

^(d) Share adjusted for 30 employer organisations without information provided.

^(e) Share adjusted for one GEOPA-COPA member without information provided.

Source: Network of Eurofound Correspondents, 2022.

4.2.2. Capacity to negotiate collective bargaining agreements

As outlined in Figure 9 above, there is at least one sector-related employer organisation or business association in each of the Member States. Of the 27 Member States, 16 record at least one employer organisation involved in sector-related collective bargaining (Table 20). Of all 86 employer organisations and business associations identified for the purpose of this study, 47 are engaged in collective bargaining. This corresponds to 55 % of all identified organisations or 62 % of those for which data on their collective bargaining involvement have been provided. The share of employer organisations that engage in collective bargaining is slightly higher among GEOPA-COPA affiliates than among all employer organisations and business associations identified. This is because GEOPA-COPA members are – by definition – employer organisations dealing with industrial relations issues, whereas many organisations that are only COPA and/or COGECA members (which are also included in this study irrespective of their role in bargaining) do not necessarily act as social partner organisations and can thus be considered business associations rather than employer organisations. In 12 Member States, there is a GEOPA-COPA affiliate that engages in collective bargaining.

Table 20: Employer organisations' involvement in collective bargaining, 2022

	All employer organisations	Employer organisations affiliated to GEOPA-COPA	
	Total number of agriculture sector employer organisations involved in any collective bargaining	Number of GEOPA-COPA member employer organisations involved in any collective bargaining (share of the total number of 23 affiliated employer organisations)	Number of GEOPA-COPA member employer organisations involved in bargaining at the sector level
Number of employer organisations (share of the total number of 86 identified employer organisations)	47 (55 %) (62 % (*))	15 (65 %)	15
Number of Member States	16	12	12
	AT, BE, CY, CZ, DE, DK, ES, FI, FR, HU, IE, IT, NL, PT, SE, SI	AT, BE, CY, CZ, ES, FI, FR, HU, IE, IT, PT, SE	AT, BE, CY, CZ, ES, FI, FR, HU, IE, IT, PT, SE
Member States in which none of the agriculture sector employer organisations are involved in any collective bargaining	11 (BG, EE, EL, HR, LT, LU, LV, MT, PL, RO, SK)	5 (HR, LT, LV, PL, SI)	5 (HR, LT, LV, PL, SI)

(*) Share adjusted for 10 employer organisations without information provided.

Source: Network of Eurofound Correspondents, 2022.

All employer organisations that are involved in sector-related collective bargaining conclude multi-employer agreements. This means that there is no single organisation that exclusively engages in company-level bargaining, since this type of bargaining is usually conducted solely by the companies, although it is often supported by the employer organisations of which they are members. However, a few organisations engage in both multi-employer and single-employer bargaining simultaneously. This is the case for Austria's LKÖ and OALF and France's FNSEA, as shown in Table 21. The same table shows the list of sector-related employer organisations and business associations and their involvement (or not) in sector-related collective bargaining, differentiated by type of bargaining (multi-employer, sector-level bargaining versus single-employer, company-level bargaining).

Table 21: Employer organisations' involvement in collective bargaining and coverage levels, 2022

Member State	Employer organisation	Involvement in collective bargaining for the agriculture sector		Collective bargaining coverage of the agricultural companies (%)
		Sector level	Company level ⁽¹⁶⁾	
AT	LKÖ	Yes	Yes	n.d., estimated as close to 100
AT	OALF	Yes	Yes	n.d., estimated as high (80)
BE	Boerenbond	Yes	No	96–100
BE	FWA	Yes	No	96–100
BE	BFG-FBEP	Yes	No	96–100
BE	AVBS	Yes	No	96–100
BG	Bulgarian Agrarian Chamber	No	No	n/a
BG	Bulgarian Farmers Union	No	No	n/a
CY	EKA	Yes	No	87.5
CY	PAC	Yes	No	87.5
CY	PEK	Yes	No	87.5
CY	NAK	Yes	No	87.5
CY	Euroagrotikos	Yes	No	87.5
CY	Agrotiki	n.d.	n.d.	n.d.
CZ	ZS ČR	Yes	No	62
CZ	ČMSZP	Yes	No	62
CZ	AKCR	n.d.	n.d.	n.d.
DE	GLFA	Yes	No	11
DE	DBV	No	No	n/a
DE	DRV	No	No	n/a
DK	GLS-A	Yes	No	~ 25
DK	L & F	No	No	n/a

⁽¹⁶⁾ Employer organisations can play a role in company-level bargaining by providing legal assistance to their company members. In some cases (e.g. in Austria), they directly engage in company-level bargaining on behalf of the management.

Member State	Employer organisation	Involvement in collective bargaining for the agriculture sector		Collective bargaining coverage of the agricultural companies (%)
		Sector level	Company level ⁽¹⁶⁾	
EE	EPKK	No	No	n/a
EE	ETKL	No	No	n/a
EE	ECA	n.d.	n.d.	n.d.
EL	Gaia Epicheirein	No	No	n/a
ES	ASAJA	Yes	No	Close to 100
ES	UPA	Yes	No	n.d.
ES	COAG	Yes	No	n.d.
ES	Asempal – Agricultura	Yes	No	n.d.
ES	EHNE	Yes	No	n.d.
ES	CAA	Yes	No	n.d.
ES	Asperhu	n.d.	No	n.d.
FI	MTA	Yes	No	100
FI	MTK	No	No	n/a
FI	SLC	No	No	n/a
FI	Palta	Yes	No	100
FR	FNSEA	Yes	Yes	100
FR	APCA	No	No	n/a
FR	Coopération Agricole	n.d.	n.d.	n.d.
HR	HPK	No	No	n/a
HU	MOSZ	Yes	No	30
IE	IFA	Yes	No	4
IT	CIA	Yes	No	n.d.
IT	Coldiretti	Yes	No	n.d.
IT	Confagricoltura	Yes	No	n.d.
IT	AGCI-Agrital	Yes	No	n.d.
IT	Legacoop	Yes	No	n.d.
IT	Fedagri	Yes	No	n.d.

Member State	Employer organisation	Involvement in collective bargaining for the agriculture sector		Collective bargaining coverage of the agricultural companies (%)
		Sector level	Company level ⁽¹⁶⁾	
LT	LŪS	No	No	n/a
LT	ŽŪR	No	No	n/a
LT	LŽŪBA	No	No	n/a
LT	LŽŪKA	No	No	n/a
LU	CPL	n.d.	n.d.	n.d.
LV	LZF	No	No	n/a
LV	LOSP	No	No	n/a
LV	LLKA	No	No	n/a
LV	ZSA	No	No	n/a
LV	LSA	No	No	n/a
MT	Koperattivi Malta	No	No	n/a
NL	LTO Nederland	Yes	No	n.d.
NL	Plantum	Yes	No	n.d.
NL	NCR	No	No	n/a
PL	KZPBC	No	No	n/a
PL	KRIR	No	No	n/a
PL	PFR	No	No	n/a
PL	FBZPR	No	No	n/a
PT	CAP	Yes	No	17
PT	FPAS	Yes	No	n.d.
PT	AABA	Yes	No	11
PT	AAR	Yes	No	15
PT	AADP	Yes	No	n.d.
PT	AHSA	Yes	No	n.d.
PT	AACG	Yes	No	n.d.
PT	AADS	Yes	No	n.d.
PT	AACACSM	Yes	No	n.d.
PT	AACVR	Yes	No	n.d.

Member State	Employer organisation	Involvement in collective bargaining for the agriculture sector		Collective bargaining coverage of the agricultural companies (%)
		Sector level	Company level ⁽¹⁶⁾	
RO	Federația Pro Agro	No	No	n/a
RO	UNCSV	No	No	n/a
SE	LRF	No	No	n/a
SE	Gröna Arbetsgivare	Yes	No	90
SI	GZS-ZKŽP	Yes	No	100
SI	KGZS	No	No	n/a
SI	ZDS	Yes	No	100
SI	ZZS	n.d.	n.d.	n.d.
SK	SPPK	No	No	n/a

Notes: n/a, not applicable; n.d., data not available. Bold font is used for GEOPA-COPA member organisations.

Source: Network of Eurofound Correspondents, 2022.

4.2.3. Representativeness status of GEOPA-COPA member organisations at the national level

Of the 86 sector-related employer organisations and business associations, 58 (or 77 % of those for which information has been provided) are recognised as representative social partner organisations in the agriculture sector, based on either mutual recognition or formal (legal) requirements. Among GEOPA-COPA members only, a similar share (78 %) are recognised representatives of the sector's companies/farms.

In terms of the coverage of Member States, in 22 Member States at least one employer organisation can be found that is a recognised representative according to national recognition criteria (Table 22). When focusing only on GEOPA-COPA affiliates, 15 Member States are covered by recognised social partner organisations.

Table 22: Representative status of GEOPA-COPA member organisations at the national level, 2022

	Recognised as representative based on national recognition criteria
Total number of agriculture sector employer organisations (share of the total number of 86 identified employer organisations)	58 (67 %) (77 % (*))
Number of Member States	22
Number of employer organisations affiliated to GEOPA-COPA (share of the total number of 23 affiliated employer organisations)	18 (78 %)
Number of Member States	15

(*) Share adjusted for 11 employer organisations without information provided.

Source: Network of Eurofound Correspondents, 2022.

4.3. Adequate structures to ensure effective participation of members

At least 22 of the 23 employer organisations affiliated to GEOPA-COPA pay membership fees for their members in the agriculture sector, covering 18 Member States (Table 23). For one Polish affiliate no data have been provided. There is no organisation that explicitly states that it does not pay affiliation fees. Furthermore, all 23 GEOPA-COPA members indicate that they are actively involved in the activities and/or working groups of GEOPA-COPA. The rate of participation in such activities among GEOPA-COPA members is thus very high. By contrast, only 10 affiliates from 10 Member States indicate that they are actively involved in the decision-making structures of GEOPA-COPA, which means that the share of affiliates that are in a position to effectively exert influence on GEOPA-COPA policy lies under 50 %. Only one member organisation, from Poland, did not provide data in this respect.

Table 23: Involvement of sectoral employer organisations in the GEOPA-COPA bodies, 2022

Member State	Employer organisation	Actively involved in the decision-making structures of GEOPA-COPA	Paying membership fees to GEOPA-COPA for its member companies in the agriculture sector	Actively involved in activities / working groups of GEOPA-COPA
AT	LKÖ	Yes	Yes	Yes
BE	Boerenbond	No	Yes	Yes
BE	FWA	No	Yes	Yes
CY	PAC	No	Yes	Yes
CZ	ČMSZP	Yes	Yes	Yes
DK	L & F	Yes	Yes	Yes
ES	ASAJA	Yes	Yes	Yes
FI	MTA	Yes	Yes	Yes
FR	FNSEA	Yes	Yes	Yes
HR	HPK	Yes	Yes	Yes
HU	MOSZ	No	Yes	Yes

IE	IFA	Yes	Yes	Yes
IT	CIA	Yes	Yes	Yes
IT	Coldiretti	No	Yes	Yes
IT	Confagricoltura	No	Yes	Yes
LT	LŪS	No	Yes	Yes
LV	LZF	No	Yes	Yes
PL	KRIR	No	Yes	Yes
PL	PFR	No	Yes	Yes
PL	FBZPR	n.d.	n.d.	Yes
PT	CAP	No	Yes	Yes
SE	Gröna Arbetsgivare	Yes	Yes	Yes
SI	KGZS	No	Yes	Yes
EU-27	23 GEOPA-COPA members	10 employer organisations in 10 Member States	22 employer organisations in 18 Member States	23 employer organisations in 18 Member States

Note: n.d., data not available.

Source: Network of Eurofound Correspondents, 2022.

4.4. Negotiation capacity of GEOPA-COPA

As stated in the Introduction, 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 must represent organisations that are themselves an integral and recognised part of Member States' social partner structures (as covered in Section 4.2.1), that they must have the capacity to negotiate labour agreements and that they are representative of several Member States. 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' (TFEU, Article 155); 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 applies the criterion of the 'capacity to negotiate' to both the EU-level partner associations and, in a bottom-up approach, the national organisations in order to assess their relevance. Following these arguments, the standard Eurofound methodology for assessing the criteria of being an 'integral part of Member State industrial relations' and having the 'capacity to negotiate' applies the 'capacity to negotiate agreements' criterion at both the EU and national levels. The mandate / mandating procedure can be either **statutory** (i.e. laid down in the constitution of the organisation or annexed to it) or **non-statutory** (i.e. laid down in secondary documents, such as rules of procedure, memoranda of understanding and/or ad hoc decisions by the governing bodies of the organisation). Finally, in the absence of the abovementioned procedures, management and labour may have an **intrinsic capacity to negotiate** as proven by their practical involvement in binding agreements, declarations and joint opinions, among other means.

According to the internal rules of procedure of GEOPA-COPA (GEOPA-COPA, 2022), specifically Article 2.1, GEOPA-COPA is mandated by COPA to represent the employers of salaried agricultural workers and to defend the interests of these employers in social areas. Article 2.2 further clarifies that this mandate concerns the ESSDC for agriculture. However, Article 2.3 sets the limit of the mandate to negotiation in areas not covered by Article 153 of the TFEU, which relates to working environment, occupational health and safety, working conditions, social security and social protection, information, the consultation of workers, collective representation and defence. Article 2.4 of the internal rules of procedure of GEOPA-COPA indicates that, in order to negotiate European agreements related to areas under Article 153, paragraph 2, of the TFEU, unanimity of GEOPA members is required. In cases where unanimity cannot be reached, Article 12.7 states that decisions can be taken by qualified majority. According to Article 14, any decision involving commitments to third parties or affecting all farmers must be submitted for approval to the COPA Praesidium, which can only refuse approval if GEOPA exceeds its mandate under Article 2. In conclusion, GEOPA-COPA can represent its members in European-level social dialogue and participate in negotiating European agreements within the scope of Article 153 of the TFEU, but cannot conclude agreements outside this scope; thus it displays a **statutory provision to negotiate and conclude sectoral agreements**.

4.5. GEOPA-COPA members' effective participation in the ESSDC

Commission Decision 98/500/EC from 1998, on the establishment of ESSDCs, stipulates in its Article 1(c) that European social partner organisations 'shall have adequate structures to ensure their effective participation in the work of the Committees'. The adequacy of the structures to enable them to represent their members on the ESSDC, in European Commission consultations and in the negotiation of binding agreements has been analysed in the previous section. In this section, the effective participation of GEOPA-COPA's members in ESSDC meetings is outlined. Based on data shared by the European Commission, GEOPA-COPA delegates from 13 Member States were represented at least twice during the ESSDC meetings in the analysed three-year interval (Table 24). Another five Member States in which GEOPA-COPA has affiliates did not attend any ESSDC meetings between 2023 and 2025 (Belgium, Croatia, Denmark, Hungary and Slovenia). It is noteworthy that the GEOPA-COPA delegates with Ireland listed as their country of origin who attended the December 2023 and March 2025 ESSDC meetings were listed as 'individuals' and not as representatives of an 'organisation', as would usually be the case for national-level social partner organisations.

Table 24: Overview of GEOPA-COPA members' participation in agriculture ESSDC meetings between 2023 and 2025

Participation	Member States	Number of Member States
Member States with participating employer organisation delegates	AT, CY, CZ, ES, FI, FR, IE ^(b), IT (2/3), LT, LV, PL (1/3), PT, SE	13 out of 18 in which GEOPA-COPA has members
Member States in which GEOPA-COPA has members, but no delegates participated between 2023 and 2025 ^(a)	BE, DK, HR, HU, SI	5

^(a) No attendance data were provided for the ESSDC meeting on 5 December 2025.

^(b) For Ireland, the attendees recorded as GEOPA members were listed under the category 'individuals', not 'organisation', as would usually be the case for national-level organisations.

Note: Bold font used for Member States from which all the GEOPA-COPA affiliates were represented.

Source: ESSDC attendance data provided by the European Commission.

5. Social partner organisations not represented on the agriculture ESSDC

5.1. National sectoral trade unions not represented on the ESSDC

Overall, 16 (28 %) out of the 58 sector-related trade unions identified for the purpose of this study are not affiliated to EFFAT and thus not represented on the agriculture ESSDC via membership to this European sectoral social partner organisation. However, at least one of these unions from Poland reported some cooperation with EFFAT at the time of the finalisation of this study, as detailed later in this chapter. These 16 trade unions are thus considered in this study due to their involvement in sector-related collective bargaining.

Table 25 demonstrates that the respective shares of the trade unions not affiliated to EFFAT of the various business activities/subsectors of agriculture do not widely differ and largely correspond to their overall proportion in the entire agriculture sector (25 %). In terms of coverage of Member States, the respective shares of Member States covered by unaffiliated trade unions organising the different parts/subsectors of agriculture as listed in Table 25 range between one third and almost half of the Member States covered by all sector-related trade unions in these subsectors. Animal production is the business segment of the agriculture sector most represented by unaffiliated trade unions, while support activities related to agriculture are least represented by them. Overall, in terms of quantity, these results indicate that national agriculture trade unions not represented on the ESSDC via EFFAT membership only play a minor role in representing workers in the sector.

Table 25: Sector-relatedness of national trade unions not represented on the agriculture ESSDC in terms of sector activities, EU-27, 2022

NACE code	Specific activities / types of production in the agriculture sector	Total number of trade unions in these activities	Non-represented trade unions	Number of Member States with non-represented trade unions organising these activities out of all Member States with unions in these activities
01.1, 01.2, 01.3	Crop growing and plant propagation	42 ^(a)	11 (26 %) ^(b)	8/20
01.4	Animal production	44 ^(a)	12 (27 %) ^(b)	9/20
01.5	Mixed farming	42 ^(a)	10 (24 %) ^(b)	8/20
01.6	Support activities to agriculture	43 ^(a)	10 (23 %) ^(b)	7/21
Total		50 ^(a)	14 (28%)	9/21

^(a) Data are not available for five trade unions.

^(b) Data are not available for three trade unions.

Source: Network of Eurofound Correspondents, 2022.

As outlined in Section 3.2.2, it is difficult to assess whether EFFAT-affiliated trade unions and unaffiliated trade unions differ in their bargaining capacities, due to the lack of data on collective

bargaining coverage for so many unaffiliated unions. On the one hand, unaffiliated trade unions are necessarily engaged in collective bargaining, since otherwise they would not have been considered in this study – which is not the case for EFFAT members due to the top-down approach of identifying relevant industrial relations actors. On the other hand, EFFAT members tend to be the larger and more relevant industrial relations actors in Member States with a pluralist associational landscape. In most Member States, irrespective of whether there is a single-association or pluralist system, the largest union is affiliated to EFFAT (Table 26). In only three Member States – Austria, Poland and Portugal – is an unaffiliated organisation the largest workers’ representative in these Member States’ agriculture sector, at least in terms of members. However, in Austria, despite the fact that LAK, as a chamber with obligatory membership, has the most members, the most important social actors in terms of collective bargaining are the PRO-GE and GPA unions, both of which are EFFAT affiliates. In the case of Poland, the largest sectoral trade union, NSZZ RI Solidarność, a small farmers’ organisation, indicated past affiliation to COPA. Additionally, another Polish organisation, Krajowy Sekretariat Przemysłu Spożywczego i Rolnictwa NSZZ Solidarność (KSPSR NSZZ Solidarność) – a long-standing member of EFFAT in the food and tobacco sectors – started representing workers in the agriculture sector in late 2024 / early 2025 following the merger of the unions’ structures within KSPSR NSZZ Solidarność. As this development was reported closer to the finalisation of the current study, KSPSR NSZZ Solidarność is not included in the current study because its membership data could not be checked by the Network of Eurofound Correspondents. However, this additional EFFAT member in Poland to the one already counted (the trade union ZZPR) might bring additional representativeness in the future and will need to be checked and accounted for in future representativeness studies for the sector.

The vast majority of sector-related trade unions for which data are available, irrespective of their (non-)affiliation to EFFAT, are recognised social partners in the agriculture sector in their Member States. Therefore, in this respect, affiliation does not make any difference.

Table 26: Membership strength of national trade unions not represented on the agriculture ESSDC, EU-27, 2022

Member State	Trade union	Number of members in agriculture	Size ranking in sector (1 or 2)	Recognition as a social partner through legal/statutory requirements (LR) or mutual recognition (MR)
AT	LAK	39 000	1	LR
AT	LFB	n.d.	—	LR + MR
CY	Segdamelin – PEO	830	2	MR
CY	Industrial – DEOK	800	—	MR
DK	Union of Agricultural and Supervisory Officers	n.d.	2	MR
ES	CIG	n.d.	—	n.d.
ES	LAB	n.d.	—	n.d.

Member State	Trade union	Number of members in agriculture	Size ranking in sector (1 or 2)	Recognition as a social partner through legal/statutory requirements (LR) or mutual recognition (MR)
FI	JHL	n.d.	—	MR
FI	Jyty	1 565	2	MR
FR	UNSA2A	1 500	—	LR
NL	De Unie	n.d.	n.d.	n.d.
NL	HZC	n.d.	n.d.	n.d.
PL	NSZZ RI Solidarność ⁽¹⁷⁾	6 000	1	LR
PT	Sintab	800	1	MR
RO	Propact	n.d.	n.d.	LR
SE	Naturvetarna	775	2	MR

Notes: LR, legal/statutory requirements; MR, mutual recognition; n/a, not applicable; n.d., data not available. In regard to size rankings, '1' indicates the largest union in the sector, '2' the second-largest union in the sector and '—' neither the largest nor the second-largest union in the sector.

Source: Network of Eurofound Correspondents, 2022.

5.2. National sectoral employer organisations and business associations not represented on the ESSDC

The majority of sector-related employer organisations and business associations considered in this study are not affiliated to GEOPA-COPA, namely 63 (73 %) of the total of 86 organisations. It is noteworthy that, in this section, the organisations that are affiliated to COPA but are not direct members of GEOPA are included. As explained in Chapter 2, while GEOPA and COPA share some membership at the national level, not all members of COPA are members of GEOPA and vice versa. As only the national-level organisations affiliated to GEOPA are social partner organisations, for the purpose of this study, the list of GEOPA members was provided to assess the representativeness of GEOPA-COPA. Thus, in this section, the organisations that are not GEOPA members and are only directly affiliated to COPA have been included, as these national-level organisations do not participate in the agriculture ESSDC, despite the fact that the official name of the employer organisation participating in the ESSDC for the agriculture sector is GEOPA-COPA.

The organisations listed and described below have been included in this study either due to their direct affiliation to COPA and/or COGECA and thus their inclusion in the previous representativeness study for the sector (top-down approach) or based on their involvement in sector-related collective bargaining (bottom-up approach). It is noteworthy that 20 of the 23 organisations that are GEOPA members and thus participate in the agriculture ESSDC are also affiliated to COPA. Similarly, 9 of

⁽¹⁷⁾ During the reviewing stages of this study, EFFAT indicated that NSZZ RI Solidarność, a small farmers' union, was a COPA affiliate.

these 20 organisations are also members of COGECA according to the data collected by the Network of Eurofound Correspondents. The full list of organisations and their European-level affiliations is available in Table 29.

Table 27 shows that the respective shares of the unaffiliated employer organisations and business associations in the various subsectors of agriculture do not widely differ and range from 57 % to 60 % of the total numbers of employer organisations in these subsectors. For many unaffiliated organisations, no data on their subsector coverage have been provided, and they are probably underrepresented in each of the subsectors compared with their overall share of the entire sector. In terms of coverage of Member States, the numbers of Member States in which unaffiliated employer organisations and business associations operate in the different parts/subsectors of the agriculture sector range from 19 to 22 Member States. Unaffiliated organisations thus exist in almost all Member States where employer organisations are active in these subsectors, whether affiliated to GEOPA-COPA or not.

Crop growing is the business segment of the sector most represented by unaffiliated employer organisations and business associations, while mixed farming is least represented by them. Compared with the trade union side, where national trade unions not affiliated to EFFAT and thus not represented on the ESSDC only play a marginal role in representing workers in the sector, on the employer side the situation is somewhat different. Most employer organisations both in the overall industry and in subsector activities are not affiliated to GEOPA-COPA via GEOPA and thus are not represented on the ESSDC. However, this is explained by the fact that many organisations affiliated directly to COPA and/or COGECA are business associations rather than employer organisations. This is also highlighted by the fact that (slightly) more GEOPA-COPA members affiliated via GEOPA are involved in sector-related collective bargaining than their unaffiliated counterparts (Section 4.2.2).

Table 27: Sector-relatedness of employer organisations not represented on the agriculture ESSDC in terms of sector activities, EU-27, 2022

NACE code	Specific activities / types of production in the agriculture sector	Total number of employer organisations in these activities	Non-represented employer organisations	Number of Member States with non-represented employer organisations organising these activities out of all Member States with employer organisations organising these activities
01.1, 01.2, 01.3	Crop growing and plant propagation	58 ^(a)	35 (60 %)	22/25 ^(c)
01.4	Animal production	55 ^(a)	32 (58 %)	20/25 ^(c)
01.5	Mixed farming	51 ^(b)	29 (57 %)	19/23 ^(d)
Total		60 ^(a, b)	63	22/25 ^(c, d)

^(a) No data available for 26 employer organisations.

^(b) No data available for 29 employer organisations.

^(c) No data available for all employer organisations in two Member States (Bulgaria and Romania).

^(d) No data available for all employer organisations in four Member States (Bulgaria, Malta, Romania and Slovenia).

Source: Network of Eurofound Correspondents, 2022.

Employer organisations and business associations not affiliated to GEOPA-COPA via affiliation to GEOPA and thus not represented on the agriculture ESSDC are the largest employer organisation in eight Member States. This is the case in Czechia, Estonia, Finland, Latvia, Luxembourg, Malta, the Netherlands and Slovakia, although in these Member States employer organisations represented on the ESSDC coexist with unaffiliated organisations. In all other Member States with available data where one or more GEOPA-COPA members can be identified in a pluralist associational system, it is the GEOPA-COPA affiliate (or one of the GEOPA-COPA affiliates if there are more than just one) that is largest in terms of company members (Table 28). This finding is also corroborated by the employer organisations' corresponding numbers of members. Nevertheless, Table 28 reveals that employer organisations not represented on the agriculture ESSDC tend to be the smaller and less significant representatives of sectoral companies rather than the employer organisations affiliated to GEOPA-COPA.

In terms of representativeness status, for the question of whether an organisation is recognised as representative enough to act as a sectoral social partner, no significant differences between affiliated and unaffiliated organisations can be found (Table 28). Most organisations in both groups are recognised as representative at the national level, either by fulfilling certain legal/statutory requirements or through mutual recognition between the relevant actors on the two sides of the industry. For some organisations such recognition criteria do not apply because the Member State in question has not established recognition procedures (e.g. Czechia) or the organisation concerned does not act as a social partner but considers itself a business or trade association. Interestingly, the organisations for which the recognition criteria are not applicable are – contrary to expectations – not more prevalent among the group not affiliated and not represented on the agriculture ESSDC than among those represented.

Likewise, employer organisations and business associations not represented on the agriculture ESSDC record a similar share of non-participants in sector-related collective bargaining to that of affiliated employer organisations. This may come as a surprise and is related to the fact that employer organisations affiliated to GEOPA-COPA have no role in bargaining in the agriculture sector in some Member States because there is either exclusive single-employer bargaining (conducted by the management of the companies without associational support) or no bargaining in the sector at all (e.g. in Latvia, Lithuania and Poland).

Table 28: Membership strength and collective bargaining involvement of national employer organisations not represented on the agriculture ESSDC, EU-27, 2022

Member State	Employer organisation	Number of member companies in the agriculture sector	Share of the national agriculture workforce (%)	Size ranking in sector	Representative status (at the national level) (yes/no)	Involvement in collective bargaining
AT	OALF	> 15 237	50	2	Yes	MEB + SEB
BE	BFG-FBEP	n.d.	n.d.	—	Yes	MEB
BE	AVBS	n.d.	n.d.	—	Yes	MEB

Member State	Employer organisation	Number of member companies in the agriculture sector	Share of the national agriculture workforce (%)	Size ranking in sector	Representative status (at the national level) (yes/no)	Involvement in collective bargaining
BG	Bulgarian Agrarian Chamber	n.d.	n.d.	n.d.	n.d.	None
BG	Bulgarian Farmers Union	n.d.	n.d.	n.d.	n.d.	None
CY	EKA	5 700	15–25	2	Yes	MEB
CY	PEK	500	0	—	Yes	MEB
CY	NAK	210	n.d.	—	Yes	MEB
CY	Euroagrotikos	780	n.d.	—	Yes	MEB
CY	Agrotiki	n.d.	n.d.	—	n.d.	n.d.
CZ	ZS ČR	1 180	42	1	n/a	MEB
CZ	AKCR	n.d.	n.d.	—	n/a	n.d.
DE	GLFA	n.d.	n.d.	n.d.	Yes	MEB
DE	DBV	> 300 000	n.d.	n.d.	n/a	None
DE	DRV	1 729	n.d.	n.d.	n/a	None
DK	GLS-A	500	25	2	Yes	MEB
EE	EPKK	> 7 000	n.d.	1	n/a	None
EE	ETKL	1 000	n.d.	2	n/a	None
EE	ECA	n.d.	n.d.	—	n.d.	n.d.
EL	Gaia Epicheirein	> 130 000	n.d.	n.d.	n/a	None
ES	UPA (regional-level organisation)	80 000	n.d.	n.d.	Yes	MEB
ES	COAG (regional-level organisation)	150 000	n.d.	n.d.	Yes	MEB
ES	Asempal – Agricultura (regional-level organisation)	n.d.	n.d.	—	n.d.	MEB

Member State	Employer organisation	Number of member companies in the agriculture sector	Share of the national agriculture workforce (%)	Size ranking in sector	Representative status (at the national level) (yes/no)	Involvement in collective bargaining
ES	EHNE (regional-level organisation)	3 000	n.d.	—	Yes	MEB
ES	CAA	n.d.	n.d.	—	Yes	MEB
ES	Asperhu (egg producers)	n.d.	n.d.	—	n.d.	n.d.
FI	MTK	40 605	70	1	n/a	None
FI	SLC	10 100	n.d.	—	n/a	None
FI	Palta	n.d.	0.5	—	Yes	MEB
FR	APCA	n.d.	n.d.	2	n/a	None
FR	Coopération Agricole	n.d.	n.d.	—	n.d.	n.d.
IT	AGCI-Agrital	1 000	n.d.	—	Yes	MEB
IT	Legacoop	1 497	n.d.	—	Yes	MEB
IT	Fedagri	n.d.	n.d.	—	Yes	MEB
LT	ŽŪR	n.d.	n.d.	2	Yes	None
LT	LŽŪBA	150–170	n.d.	—	Yes	None
LT	LŽŪKA	12	n.d.	—	Yes	None
LU	CPL	800	60	1	Yes	n.d.
LV	LOSP	10 000–15 000	n.d.	1	Yes	None
LV	LLKA	5 300	n.d.	—	Yes	None
LV	ZSA	800	n.d.	—	Yes	None
LV	LSA	50	1	—	Yes	None
MT	Koperattivi Malta	2 192	25	1	Yes	None
NL	LTO Nederland	36 500	n.d.	1	Yes	MEB
NL	Plantum	300	n.d.	2	Yes	MEB

Member State	Employer organisation	Number of member companies in the agriculture sector	Share of the national agriculture workforce (%)	Size ranking in sector	Representative status (at the national level) (yes/no)	Involvement in collective bargaining
NL	NCR	n.d.	n.d.	—	Yes	None
PL	KZPBC	24 000	n.d.	—	No	None
PT	FPAS	750	0.3	2	Yes	MEB
PT	AABA	400	0.2	—	Yes	MEB
PT	AAR	242	0.3	—	Yes	MEB
PT	AADP	n.d.	0.1	—	Yes	MEB
PT	AHSA	40	0.4	—	Yes	MEB
PT	AACG	22	0.1	—	Yes	MEB
PT	AADS	150	0.2	—	Yes	MEB
PT	AACACSM	n.d.	< 0.1	—	Yes	MEB
PT	AACVR	20	< 0.1	—	Yes	MEB
RO	Federația Pro Agro	n.d.	n.d.	n.d.	Yes	None
RO	UNCSV	n.d.	n.d.	—	n.d.	n.d.
SE	LRF	140 000	n.d.	n.d.	Yes	None
SI	GZS-ZKŽP	43	70	2	Yes	MEB
SI	ZDS	n.d.	> 10	—	Yes	MEB
SI	ZZS	n.d.	n.d.	—	n.d.	n.d.
SK	SPPK	1 295	43	1	Yes	None

Notes: MEB, multi-employer bargaining; n/a, not applicable; n.d., data not available; SEB, single-employer bargaining. In regard to size ranking in sector, '1' indicates the largest organisation in the Member State's sector, '2' the second-largest organisation in the Member State's sector and '—' neither the largest nor the second-largest organisation in the Member State's sector.

Source: Network of Eurofound Correspondents, 2022.

6. Other European organisations

6.1. Other European trade union organisations

Among the sector-related trade unions, there are hardly any affiliations to European associations other than EFFAT for their members in the agriculture sector. Some of the unions indicate being affiliated to the IUF, which is in fact the global umbrella organisation of the European organisation EFFAT. However, since EFFAT is the organisation directly in charge of the European trade unions organising workers in agriculture, rather than the IUF, consideration of the latter organisation does not add any value. Italy's Confederia states that it is affiliated to the European Board on Agriculture and Food; however, this entity is an expert group established by the European Commission in January 2025 with the aim of providing high-level advice to the European Commission rather than an organisation that represents the interests of its members. No other affiliation has been demonstrated among the national trade unions identified. Therefore, EFFAT appears to be the exclusive representative voice of agricultural workers in European sectoral social dialogue.

6.2. Other European employer organisations and business associations

Before proceeding with the analysis of the other European organisations representing employers in the agriculture sector, it is worth referring to the explanation from Chapter 2. Despite the fact that the official name of the employer organisation participating in the ESSDC for agriculture sector is 'GEOPA-COPA', the organisations GEOPA and COPA do not share membership at the national level. This means that there are organisations affiliated to GEOPA that are not in fact COPA members and vice versa. As only the national-level organisations directly affiliated to GEOPA participate in the works of the ESSDC, for the purpose of this study, the list of GEOPA members was provided in order to assess the representativeness of GEOPA-COPA. Thus, in this section, affiliation solely to COPA, with no affiliation to GEOPA, will be treated as affiliation to another European organisation representing employers in the agriculture sector.

Table 29 shows that COPA records at least one affiliate in all Member States, whereas COGECA has at least one member in 23 Member States. In this context it is noteworthy that information about affiliation to European employer organisations and business associations other than GEOPA has not been provided for all national employer organisations; thus, the data listed in Table 29 may be incomplete. Interestingly, the same table indicates not only that the number of affiliations to COPA and/or COGECA outweighs the number of affiliations to GEOPA (23 affiliations could be identified for the latter), but also that the number of Member States covered through affiliations to COPA and/or COGECA is higher than the number of Member States covered through affiliations to GEOPA (18 Member States covered for the latter). However, as outlined in Chapter 2, this is related to the fact that GEOPA, as the national employer organisations' representative for agriculture, is mandated by COPA to represent the agriculture employers' collective interests on the agriculture ESSDC on behalf of COPA. Nevertheless, this does not imply that all GEOPA members are simultaneously affiliated to COPA (see the cases of Czechia's ČMSZP and Sweden's Gröna Arbetsgivare), although a high share of GEOPA members are also affiliated to COPA. While, according to its statutes, GEOPA is the voice of

the agriculture sector's national employer organisations acting as social partners vis-à-vis organised labour, COPA organises and represents the sector's national employer organisations and business associations of farmers and their families. COGECA, in turn, represents and defends the interests of the agricultural cooperatives; it organises national associations representing these cooperatives. COPA and COGECA merged their structures and share one secretariat. Hence, although COPA and COGECA record a higher number of affiliations and Member States covered than GEOPA, the latter organisation is the only and explicitly demarcated European social partner organisation acting on behalf of agriculture employers.

Apart from COPA and COGECA, a number of European and international organisations other than GEOPA can be identified as recording one or a few affiliations of sector-related national employer organisations. All these organisations are listed in Table 29. Only very few of them claim to have a membership domain in terms of activities and/or type of companies that covers the entire or at least major parts of the agriculture sector. One of them is the World Farmers' Organisation (WFO), the international voice of national farmers' organisations and agricultural cooperatives, with two affiliations from two Member States (Ireland and the Netherlands). The WFO considers itself a global lobbying organisation advocating for the participation of farmers in decision-making in the wide area of agriculture policy. Other organisations with affiliations from Member States include a network of agriculture experts who develop innovative and sustainable modes of production in the sector (Farm Europe) and a network uniting advisory organisations to shape the future of agriculture in Europe (the European Forum for Agricultural and Rural Advisory Services (EufRAS)). Most other organisations with affiliations from the Member States represent only a small group of farmers and/or activities in the sector, such as the International Cooperative Alliance (ICA), the European Landowners' Organization (ELO) and the European Dairy Association (EDA). These organisations record affiliations from at least two Member States. All other organisations only have one affiliation and can be seen in the table. As – apart from COPA and COGECA (see above) – none of the organisations outlined in this section cover more than three Member States and, most importantly, none act as cross-national social partner organisations, they by no means compete with GEOPA as the sector's recognised collective voice of employers in the arena of European social dialogue.

Table 29: Other European organisations with affiliated agriculture-sector national employer organisations, EU-27, 2022

Member State	Employer organisation	Activities in crop growing	Activities in animal production	Activities in mixed farming	European affiliation
AT	LKÖ	Yes	Yes	Yes	COPA
AT	OALF	Yes	Yes	Yes	
BE	Boerenbond	Yes	Yes	Yes	COPA, COGECA
BE	FWA	Yes	Yes	Yes	COPA
BE	BFG-FBEP	Yes	No	No	
BE	AVBS	n.d.	n.d.	n.d.	
BG	Bulgarian Agrarian Chamber	n.d.	n.d.	n.d.	COPA, COGECA
BG	Bulgarian Farmers Union	n.d.	n.d.	n.d.	COPA, COGECA

Member State	Employer organisation	Activities in crop growing	Activities in animal production	Activities in mixed farming	European affiliation
CY	EKA	Yes	Yes	Yes	COPA, COGECA, CEJA
CY	PAC	Yes	Yes	Yes	COPA, COGECA, CEJA
CY	PEK	n.d.	n.d.	n.d.	COPA, CEJA
CY	NAK	Yes	Yes	Yes	COPA, CEJA
CY	Euroagrotikos	Yes	Yes	No	COPA
CY	Agrotiki	n.d.	n.d.	n.d.	COPA
CZ	ZS ČR	Yes	Yes	Yes	COPA, COGECA, ICA, Farm Europe
CZ	ČMSZP	Yes	Yes	Yes	ELO
CZ	AKCR	n.d.	n.d.	n.d.	COPA, COGECA
DE	GLFA	Yes	Yes	Yes	
DE	DBV	Yes	Yes	Yes	COPA
DE	DRV	Yes	Yes	Yes	COGECA
DK	GLS-A	Yes	Yes	Yes	
DK	L & F	Yes	Yes	Yes	COPA, COGECA, EDA, UECBV
EE	EPKK	Yes	Yes	Yes	COPA, COGECA, EDA, Eucolait
EE	ETKL	Yes	Yes	Yes	COPA, COGECA
EE	ECA	n.d.	n.d.	n.d.	COGECA
EL	Gaia Epicheirein	Yes	Yes	Yes	COPA, COGECA, Eufra, Farm Europe
ES	ASAJA	Yes	Yes	Yes	COPA, EAC
ES	UPA (regional-level organisation)	Yes	Yes	Yes	COPA
ES	COAG (regional-level organisation)	Yes	Yes	Yes	COPA, Via Campesina Europe
ES	Asempal – Agricultura (regional-level organisation)	n.d.	n.d.	n.d.	
ES	EHNE (regional-level organisation)	n.d.	n.d.	n.d.	
ES	CAA	n.d.	n.d.	n.d.	COGECA
ES	Asperhu (egg producers)	n.d.	n.d.	n.d.	COPA
FI	MTA	Yes	Yes	Yes	
FI	MTK	Yes	Yes	Yes	COPA

Member State	Employer organisation	Activities in crop growing	Activities in animal production	Activities in mixed farming	European affiliation
FI	SLC	Yes	Yes	Yes	COPA
FI	Palta	n.d.	n.d.	n.d.	
FR	FNSEA	Yes	Yes	Yes	COPA
FR	APCA	Yes	Yes	Yes	COPA, COGECA, Eufra
FR	Coopération Agricole	n.d.	n.d.	n.d.	COGECA
HR	HPK	Yes	Yes	Yes	COPA, COGECA
HU	MOSZ	Yes	Yes	Yes	COPA, COGECA
IE	IFA	Yes	Yes	Yes	COPA, WFO
IT	CIA	Yes	Yes	Yes	COPA
IT	Coldiretti	Yes	Yes	Yes	COPA, COGECA
IT	Confagricoltura	Yes	Yes	Yes	COPA
IT	AGCI-Agrital	Yes	Yes	Yes	
IT	Legacoop	n.d.	n.d.	n.d.	ICA
IT	Fedagri	n.d.	n.d.	n.d.	
LT	LŪS	Yes	Yes	Yes	COPA, COGECA
LT	ŽŪR	Yes	Yes	Yes	COPA, COGECA, IDF, ICAR
LT	LŽŪBA	Yes	No	Yes	COPA, COGECA
LT	LŽŪKA	Yes	Yes	No	COPA, COGECA
LU	CPL	Yes	Yes	Yes	COPA, COGECA
LV	LZF	Yes	Yes	Yes	COPA
LV	LOSP	Yes	Yes	Yes	COPA, COGECA, European Milk Board
LV	LLKA	Yes	Yes	n.d.	COGECA
LV	ZSA	Yes	Yes	Yes	COPA
LV	LSA	No	Yes	Yes	COPA
MT	Koperattivi Malta	Yes	Yes	No	COPA, COGECA
NL	LTO Nederland	Yes	Yes	Yes	COPA, COGECA, WFO
NL	Plantum	Yes	No	No	Euroseeds, Ciopora
NL	NCR	Yes	Yes	Yes	COGECA, ICA
PL	KZPBC	Yes	n.d.	n.d.	COPA (indirectly), CIBE

Member State	Employer organisation	Activities in crop growing	Activities in animal production	Activities in mixed farming	European affiliation
PL	KRIR	Yes	Yes	Yes	COPA, COGECA, Eufra
PL	PFR	Yes	Yes	Yes	COPA
PL	FBZPR	Yes	Yes	n.d.	COPA
PT	CAP	Yes	Yes	Yes	COPA, ELO
PT	FPAS	No	Yes	Yes	EPSPA, IMPA
PT	AABA	n.d.	n.d.	n.d.	
PT	AAR	n.d.	n.d.	n.d.	
PT	AADP	n.d.	n.d.	n.d.	
PT	AHSA	Yes	No	No	
PT	AACG	n.d.	n.d.	n.d.	
PT	AADS	n.d.	n.d.	n.d.	
PT	AACACSM	n.d.	n.d.	n.d.	
PT	AACVR	n.d.	n.d.	n.d.	
RO	Federația Pro Agro	n.d.	n.d.	n.d.	COPA, COGECA
RO	UNCSV	n.d.	n.d.	n.d.	COPA, COGECA
SE	LRF	Yes	Yes	Yes	COPA, COGECA
SE	Gröna Arbetsgivare	Yes	Yes	Yes	
SI	GZS-ZKŽP	Yes	Yes	Yes	WAPA
SI	KGZS	Yes	Yes	Yes	COPA, COGECA
SI	ZDS	n.d.	n.d.	n.d.	
SI	ZZS	n.d.	n.d.	n.d.	COGECA
SK	SPPK	Yes	Yes	Yes	COPA, COGECA

Notes: CEJA, European Council of Young Farmers; CIBE, International Confederation of European Beet Growers; Ciopora, International Community of Breeders of Asexually Reproduced Ornamental and Fruit Varieties; EAC, Eco-Agri Center; EPSPA, European Pig Selection and Production Association; ICAR, International Committee for Animal Recording; IDF, International Dairy Federation; IMPA, International Marine Purchasing Association; n.d., data not available; UECBV, European Livestock and Meat Trades Union; WAPA, World Apple and Pear Association. Bold font is used for GEOPA member organisations.

Source: Network of Eurofound Correspondents, 2022.

7. Conclusions

There are around 8.4 million persons and 9.1 million companies in the agriculture sector in the EU-27, highlighting the strong prevalence of atypical employment (self-employment and informal, part-time or seasonal work) in the sector. The workers are organised by 58 trade unions in 23 Member States, and the employers by 86 employer organisations in all 27 Member States. There are four Member States with no sectoral trade union: Estonia, Greece, Latvia and Malta.

EFFAT has been organised at the EU level since 2000 and has 42 affiliated national sectoral trade unions in all 23 Member States reporting agriculture unions (Table 30). In terms of **sector-relatedness**, EFFAT represents trade unions that organise all categories of agricultural workers: cross-border workers, posted workers, non-salaried employees, workers employed by subcontractors, employees working in cooperatives and farm owners who employ salaried or non-salaried employees. In terms of membership strength, EFFAT organises 72 % of all national agriculture trade unions, and, based on the scarce data available and methodological limitations discussed in Chapter 3, represents between 4 % and 9 % of the entire sectoral workforce in the EU-27.

Out of the 58 trade unions in 23 Member States organising workers in the agriculture sector, 56 unions from 21 Member States are involved in some form of collective bargaining. The two agriculture unions from Lithuania and Luxembourg have reported no involvement in collective bargaining. **There are 40 EFFAT members that participate in social dialogue structures in all the 21 Member States in which collective bargaining exists in the agriculture sector.** As detailed in Section 3.4, **EFFAT also displays a fully formalised mandating procedure and statute-based negotiation capacity.** Additionally, out of the 23 Member States in which EFFAT has members, delegates from 14 attended the ESSDC meetings between 2023 and 2025 at least twice.

In terms of future capacity building, there are 16 national sectoral trade unions from nine Member States not represented on the ESSDC; however, at least one trade union from these nine Member States is represented by EFFAT, and one of these trade unions, from Poland, has become an EFFAT affiliate following a merger in early 2026 (see Chapter 5, Table 26). Additionally, as indicated in Table 15, EFFAT members from 9 Member States out of 23 have not participated in the ESSDC meetings of the last three years. The current study identified no other relevant European trade union organisation to which national-level agriculture trade unions are affiliated. Affiliation to the IUF, which is a global umbrella organisation, was not considered relevant, as EFFAT is a regional, European organisation that is part of the IUF.

Based on the findings documented in this study, it can be concluded that EFFAT is the only representative European trade union organisation in the agriculture sector.

GEOPA-COPA has been organised at the EU level since 1993 and currently has 23 affiliated employer organisations in 18 Member States (Table 30). The nine Member States where there are national sectoral employer organisations, but none affiliated to GEOPA-COPA, are (ordered by the size of the national sectoral workforce) Romania, Greece, Germany, Bulgaria, the Netherlands, Slovakia, Estonia, Luxembourg and Malta. The **sector-relatedness** of GEOPA-COPA covers all types of companies in all economic activities in the agriculture sector, in all company size groups in terms of both number of workers and size of cultivated farmland. In terms of membership strength, GEOPA-

COPA covers 27 % of the national sectoral employer organisations. The 23 affiliated employer organisations represented by GEOPA-COPA represent, based on the scarce membership data available, discussed in Chapter 4, around 41 % of the agricultural companies within the EU-27.

Out of the 86 employer organisations and business associations identified in this study, 47 are involved in collective bargaining. **There are 15 GEOPA-COPA members involved in sectoral collective bargaining in 12 Member States:** Austria, Belgium, Cyprus, Czechia, Finland, France, Hungary, Ireland, Italy, Portugal, Slovenia and Spain. As detailed in Section 4.4, **GEOPA-COPA has a formalised mandating procedure for its negotiation capacity.** Strong effective participation in ESSDC meetings was recorded from 2023 to 2025, with delegates from 13 out of the 18 Member States attending the meetings at least twice.

In terms of future capacity building, there are 63 employer organisations and business associations identified in this study that are not affiliated to GEOPA-COPA, from 24 Member States. Most notably, in Romania, the Member State with the highest number of farms, neither of the two employer organisations recorded is affiliated to GEOPA-COPA, and the Member State is thus not represented on the ESSDC (Chapter 5).

A number of European organisations have some representativeness in the sector, including COPA, which has at least one member in each of the 27 Member States, and COGECA, which has at least one member in 23 Member States. However, as outlined in Chapter 2, GEOPA is the national employer organisations' representative for agriculture, mandated by COPA to represent the agriculture employers' collective interests on the agriculture ESSDC on its behalf. Nevertheless, this does not imply that all GEOPA members are simultaneously affiliated to COPA, although most GEOPA members are also affiliated to COPA. While, according to its statutes, GEOPA is the voice of the agriculture sector's national employer organisations acting as social partners vis-à-vis organised labour, COPA organises and represents the sector's national employer organisations and business associations of farmers and their families. COGECA, in turn, represents and defends the interests of the agricultural cooperatives and organises national associations representing these cooperatives. COPA and COGECA merged their structures and share one secretariat. Therefore, although COPA and COGECA are representative, GEOPA is the only explicitly mandated European social partner organisation acting on behalf of agriculture employers. Apart from COPA and COGECA, a number of European and international organisations other than GEOPA were found to have only one or a few affiliates in each Member State. A complete list is available in Chapter 6.

Based on the findings documented in this study, it can be concluded that GEOPA-COPA is the most representative European employer organisation for the agriculture sector.

Table 30: Comparative overview of the social partners in the agriculture sector based on Commission Decision 98/500/EC criteria, 2022

Criteria	EFFAT	GEOPA-COPA	Trade unions not represented on the agriculture ESSDC	Employer organisations not represented on the agriculture ESSDC
Sector-relatedness	42/58 TUs	23/86 EOs	16/58 TUs	63/86 EOs
Coverage of the Member States	4–9 % of the total EU-27 workforce in 23/23 MSs with TUs	~ 41 % of all EU-27 companies in 18/27 MSs	No data on the total coverage of the EU-27 workforce in 22/23 MSs with unions	No data on the total coverage of the EU-27 companies
Capacity to negotiate	Statutory mandate	Statutory mandate	n/a	n/a
Adequate structures	14/23 MSs represented in ESSDC meetings, 2023–2025	13/18 MSs represented in ESSDC meetings, 2023–2025	n/a	n/a

Note: EO, employer organisation; MS, Member State; n/a, not applicable; TU, trade union.

Source: Authors' compilation based on EFFAT, 2024, and GEOPA-COPA, 2022.

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Annex

Table 31: Classification of factors for the change in the number of national-level social partner organisations

Factor	Explanation
Organisational change	Changes in the membership of social partner organisations, including loss of members in the sector and mergers between organisations
Structural change	Strong contraction of agricultural activities leading to the disappearance of social partner organisations
Change in legal conditions	Loss of legal recognition due to decreasing membership

Table 32: Largest employers in the agriculture sector in 2022

Member State	Largest employers in the sector	Number (estimation) of sector-related employees	Trade union(s) organising the employees in the company	Employer organisation(s) to which this employer is affiliated	Collective bargaining type applicable for this employer (SEB/MEB)
AT	Raiffeisen Ware	2 300	PRO-GE, LFB Upper Austria	ÖRV, member of LKÖ	SEB
	'Unser Lagerhaus' Warenhandels-Gesellschaft	n.d.	GPA	ÖRV, member of LKÖ	SEB
	Lagerhaus Zwettl	1 000–1 500	GPA	ÖRV, member of LKÖ	SEB (group agreement)
BE	Greenyard Frozen Belgium	350	n.d.	Unknown	Yes, both
	SESVanderhave	290	n.d.	Unknown	Yes, both
	Biobest group	225	n.d.	Unknown	Yes, both
BG	Irrigation Systems (Напоителни системи)	1 489	FNSZ	None	SEB
	Hail Suppression Agency at the Ministry of Agriculture, Food and Forestry / Изпълнителна агенция Борба с градушките към	1 017	NFZGS Podkrepa	None	SEB

Member State	Largest employers in the sector	Number (estimation) of sector-related employees	Trade union(s) organising the employees in the company	Employer organisation(s) to which this employer is affiliated	Collective bargaining type applicable for this employer (SEB/MEB)
	Министерство на земеделието [not a company]				
	Millennium 2000 Ltd / МИЛЕНИУМ 2000 ЕООД	364	FNSZ	None	SEB
CY	Alion Vegetables & Fruits Co Ltd	~ 200	Omepege – SEK	n/a	SEB
	A. Mintikkis Farm Ltd	~ 100–200	Omepege – SEK	n/a	SEB
	Fasouri Farm	~ 30 permanent employees; ~ 100 employees during the harvest period	Segdamelin – PEO	n/a	SEB
CZ	Xaverov, AS	250–499	No trade union	None	MEB after extension
	Mach Drůbež AS	250–499	No trade union	None	MEB after extension
	Zemědělské družstvo Dolní Újezd	250–499	No trade union	None	MEB
DE	n.d.	n.d.	n.d.	n.d.	n.d.
DK	n.d.	n.d.	n.d.	n.d.	n.d.
EE	Rakvere Farmid Aktsiaselts	136	n.d.	EPKK	n.d.
	Aktsiaselts Plantex	129	n.d.	EPKK	n.d.
	Osaühing Estonia	128	n.d.	EPKK	None
EL	n.d.	n.d.	n.d.	n.d.	n.d.
ES	Agrobolsa SL (Sástago)	1 884	n.d.	n.d.	MEB
	Vejer de la Frontera	589	n.d.	n.d.	MEB
	Madrigalejo	551	n.d.	n.d.	MEB
FI	Valio	12 000	Industrial Union	MTA	MEB
	Proagria	600	Finnish Association of Academic Agrologists (not a social partner organisation)	MTA	MEB

Member State	Largest employers in the sector	Number (estimation) of sector-related employees	Trade union(s) organising the employees in the company	Employer organisation(s) to which this employer is affiliated	Collective bargaining type applicable for this employer (SEB/MEB)
	Pakkasmarja	300	Industrial Union	MTA	MEB
FR	n.d.	n.d.	n.d.	n.d.	n.d.
HR	Belje Plus d.o.o.	1 450	PPDIV	None	MEB
	VUPIK	780	PPDIV	None	MEB
	PIK Vinkovci	400	PPDIV	None	MEB
HU	Bóly Zrt	597	Cross-sectoral union LIGA (Baranya)	n.d.	SEB
	Agroprodukt Zrt	339	n.d.	n.d.	n.d.
	Dalmand Zrt	316	n.d.	n.d.	n.d.
IE	n.d.	n.d.	n.d.	n.d.	n.d.
IT	AVI.COOP Società Cooperativa Agricola	9 000	FLAI CGIL, FAI CISL, UILA UIL	n.d.	MEB
	Agricola TreValli Società Cooperativa	7 000	FLAI CGIL, FAI CISL, UILA UIL	n.d.	MEB
	A.I.A. Agricola Italiana Alimentare SpA	1 000	FLAI CGIL, FAI CISL, UILA UIL	n.d.	MEB
LT	Vilniaus paukštynas, AB	1 200	Company-level trade union of Vilniaus paukštynas, AB	Confederation of Lithuanian Employers (cross-sectoral EO)	None
	Kauno grūdai, AB	900	Company-level trade union of Kauno grūdai, AB one	Kaunas Chamber of Commerce, Industry and Crafts (regional cross-sectoral EO)	None
	Baltic Champs, UAB	500	None	Šiauliai Chamber of Commerce, Industry and Crafts (regional cross-sectoral EO)	None
LU	n.d.	n.d.	n.d.	n.d.	n.d.
LV	Putnu fabrika Ķekava	776	n.d.	n.d.	n.d.
	Balticovo	337	n.d.	n.d.	n.d.
	LatRaps	216	n.d.	LLKA, ZSA	n.d.

Member State	Largest employers in the sector	Number (estimation) of sector-related employees	Trade union(s) organising the employees in the company	Employer organisation(s) to which this employer is affiliated	Collective bargaining type applicable for this employer (SEB/MEB)
MT	n/a	n/a	n/a	n/a	n/a
NL	Royal FrieslandCampina NV	8 000	FNV, CNV Vakmensen, De Unie	Nederlandse Zuivel Organisatie (NZO), Nationale Coöperatieve Raad (NCR)	MEB
	Royal FloraHolland	2 750	FNV, CNV Vakmensen	Nationale Coöperatieve Raad (NCR)	SEB
	Livestock Farming	2 500	FNV, CNV Vakmensen	Nederlandse Vereniging Diervoederindustrie (Nevedi), Nationale Coöperatieve Raad (NCR)	MEB
PL	Top Farms	n.d.	„Głubczyce”, part of ZZPR	PFR	No
	Goodvalley	n.d.	None identified	PFR	No
	Grupa Pieprzyk	n.d.	None identified	PFR	No
PT	Maravilha Farms – Produção e Comercialização de Frutos, Unipessoal, LDA	700	Sintab, Setaab	AHSA	MEB
	Hortipor – Export, Lda.	500	Sintab, Setaab	AHSA	MEB
	Vitacress Portugal, SA	300	Sintab, Setaab	AHSA	MEB
RO	Agricost S.A	787 (in 2021)	n.d.	n.d.	n.d.
	Agrisol International R.O. SRL	928 (in 2021)	n.d.	n.d.	n.d.
	Avicarvil SRL	918 (in 2021)	n.d.	Federația Pro Agro	n.d.
SE	Lantmännen	18 726 farmers in 2021	Kommunal, Unionen, Naturvetarna	None	Both
	Scan AB	6 000 farmers	Kommunal, Unionen, Naturvetarna	None	Both
	Arla	2 236 farmers in 2021	Kommunal, Unionen, Naturvetarna	None	Both
SI	Evrosad d.o.o.	100–150 employees	Company-level union	GZS-ZKŽP	Both

Member State	Largest employers in the sector	Number (estimation) of sector-related employees	Trade union(s) organising the employees in the company	Employer organisation(s) to which this employer is affiliated	Collective bargaining type applicable for this employer (SEB/MEB)
	Panvita d.d.	50–100 employees	n.d.	GZS-ZKŽP, ZDS	Both
	Radgonske gorice d.o.o.	100–150 employees	n.d.	GZS-ZKŽP	Both
SK	Poľnohospodárske družstvo Mestečko	210	No trade union	SPPK	None
	Poľnohospodárske družstvo Sokolce	160	No trade union	SPPK	None
	Poľnohospodárske družstvo Kolárovo	155	No trade union	SPPK	None

Note: EO, employer organisation; MEB, multi-employer bargaining; n/a, not applicable; n.d., data not available; SEB, single-employer bargaining.

Source: Network of Eurofound Correspondents, 2022.

Table 33: Reasons for organisational fragmentation and pluralism among trade unions in the agriculture sector, 2022

Member State	Represents different categories of workers in terms of skills level in the sector (low/medium/high-skilled workers)	Different parts of the Member State	Different types of farms/companies (microenterprises, SMEs, larger companies)	Different parts of the agriculture sector / different types of activities	Some trade unions play the role of professional organisation on top of their role as trade unions	Ideological	Other reasons
AT		Yes				Yes	
BE		Yes		Yes		Yes	Based on the blue-collar / white-collar worker division
BG			Yes			Yes	
CY						Yes	
CZ							
DE							
DK	Yes						
EE							
EL							

Member State	Represents different categories of workers in terms of skills level in the sector (low/medium/high-skilled workers)	Different parts of the Member State	Different types of farms/companies (microenterprises, SMEs, larger companies)	Different parts of the agriculture sector / different types of activities	Some trade unions play the role of professional organisation on top of their role as trade unions	Ideological	Other reasons
ES		Yes					
FI	Yes						
FR	Yes					Yes	
HR							
HU							
IE							
IT						Yes	
LT							
LU							
LV							
MT							
NL						Yes	Only HZC organises a specific group of personnel in the sector: 'machine-bound' personnel (people working with machines)
PL				Yes		Yes	
PT						Yes	
RO							The two agriculture trade unions are affiliated to different national umbrella organisations
SE	Yes			Yes			
SI							
SK							

Note: SMEs, small and medium-sized enterprises.

Source: Network of Eurofound Correspondents, 2022.

Table 34: Reasons for organisational fragmentation among employer organisations in the agriculture sector, 2022

Member State	Members in different parts of the Member State / similar membership domain, but ideological differences	Covers different parts of the sector / different types of activities	Members in different types/sizes of companies (microenterprises, SMEs, large companies)	Some organisations represent only the business/trade interests of the members, other national employer organisations represent same members for social dialogue and collective bargaining	Some organisations operate as trade organisations lobbying for the product prices (or promoting certain standards for the sector), in addition to their role as employer organisations	Other reasons
AT						For historical reasons, chambers (e.g. LKÖ) coexist with voluntary employer organisations (OALF members).
BE		Yes				Organisations organise in different parts of the Member State.
BG		Yes	Yes			
CY	Yes	Yes		Yes		
CZ				Yes	Yes	
DE				Yes		
DK				Yes		
EE			Yes			In agriculture, organisations represent the same fields (although somewhat different companies on occasion), but the main difference is that EPKK also covers other sectors; also, historically, ETKL represents more small and medium-sized family farms,

Member State	Members in different parts of the Member State / similar membership domain, but ideological differences	Covers different parts of the sector / different types of activities	Members in different types/sizes of companies (microenterprises, SMEs, large companies)	Some organisations represent only the business/trade interests of the members, other national employer organisations represent same members for social dialogue and collective bargaining	Some organisations operate as trade organisations lobbying for the product prices (or promoting certain standards for the sector), in addition to their role as employer organisations	Other reasons
						while EPKK concentrates more on large agricultural companies.
EL						
ES	Yes		Yes		Yes	
FI				Yes		There are business associations organising members in different national languages (Finnish/Swedish). Agriculture is an important sector on the largely Swedish-speaking west coast.
FR				Yes		
HR						
HU						T
IE						
IT	Yes					
LT			Yes			
LU						
LV	Yes	Yes				
MT						
NL		Yes		Yes		
PL		Yes				

Member State	Members in different parts of the Member State / similar membership domain, but ideological differences	Covers different parts of the sector / different types of activities	Members in different types/sizes of companies (microenterprises, SMEs, large companies)	Some organisations represent only the business/trade interests of the members, other national employer organisations represent same members for social dialogue and collective bargaining	Some organisations operate as trade organisations lobbying for the product prices (or promoting certain standards for the sector), in addition to their role as employer organisations	Other reasons
PT		Yes	Yes	Yes	Yes	Many employer organisations organise employers at the regional or local level.
RO		Yes	Yes			
SE				Yes		
SI			Yes	Yes		
SK		Yes	Yes			.

Note: SMEs, small and medium-sized enterprises.

Source: Network of Eurofound Correspondents, 2022.

Table 35: Level of collective bargaining practices by Member State, 2022

Type of collective bargaining	Member States
Multi-employer	AT, HU, IT
Single-employer and multi-employer	BE, CY, CZ, DE, DK, ES, FI, FR, IE, NL (*), PL, PT, RO, SE, SI, SK
Single-employer	BG, HR
None	EE, EL, LU, LV, LT, MT

(*) According to the Dutch EFFAT affiliate FNV, in the Netherlands multi-employer bargaining predominates. However, since the Network of Eurofound Correspondents indicated that there are also a number of collective bargaining agreements at the company level, the Netherlands has been included in the 'single-employer and multi-employer' bargaining category in this table.

Source: Network of Eurofound Correspondents, 2022.

Table 36: Coverage of national sectoral collective bargaining, 2022

Type of collective bargaining	Collective bargaining coverage						Information not available
	> 94 %	75–94 %	50–74 %	25–49 %	1–24 %	0 %	
Multi-employer	IT	AT		HU			
Single-employer and multi-employer	BE, ES, FI, FR, SI, SE	CY, DK, NL (*)	CZ, PT	IE	DE, SK		PL, RO
Single-employer				HR	BG		
None						EE, EL, LT, LU, LV, MT	

(*) According to the Dutch EFFAT affiliate FNV, in the Netherlands multi-employer bargaining predominates. However, since the Network of Eurofound Correspondents indicated that there are also a number of collective bargaining agreements at the company level, the Netherlands has been included in the 'single-employer and multi-employer' bargaining category in the table.

Source: Network of Eurofound Correspondents, 2022.

Table 37: List of joint opinions of the agriculture ESSDC (since 1997) and of the Joint Committee on Social Problems of Agricultural Workers (between 1978 and 1997)

Date	Topic of the joint opinion or agreement
14 December 2023	Joint statement on the effects of severe meteorological conditions on agriculture
28 March 2023	Joint statement of the European social partners in agriculture for the ratification of [International Labour Organization] Convention C184
15 June 2021	Opinion of the European social partners in agriculture on the European Labour Authority campaign on seasonal work
16 April 2021	Opinion of the European social partners in agriculture on the 'Report on strengthening social dialogue in the EU' of February 2021
15 May 2020	Joint declaration of the European social partners of agriculture – GEOPA-COPA and EFFAT – on the deployment of seasonal workers from European countries in the EU
4 December 2017	Statement of the European social partners in agriculture – GEOPA-COPA and EFFAT – 'Social security for cross-national seasonal workers: Effective social protection for workers and manageable administrative burden'
7 November 2017	Statement of the European social partners in agriculture – GEOPA-COPA and EFFAT – 'Social dialogue as the most effective means of combating social dumping and undeclared work in the agriculture sector: The shift towards sustainable and high quality jobs'
12 November 2015	Joint declaration of the social partners in European agriculture on their work programme 'Priorities for 2015 to 2017 – Creating a social Europe'
16 December 2010	Common opinion from GEOPA-COPA and EFFAT on roll-over protection structures for narrow-track wheeled tractors
3 September 2010	Joint declaration – European Union Association Agreement – Euromed
3 September 2010	Protecting workers' health against plant protection products – Resolution
3 September 2010	Joint declaration of the European social partners in agriculture on the Commission's Communication (2009)591 'A better functioning food supply chain in Europe'
10 May 2007	Resolution regarding creation of an Agripass CV

Date	Topic of the joint opinion or agreement
21 November 2005	European agreement on the reduction of workers' exposure to the risk of work-related musculoskeletal disorders in agriculture
24 October 2004	Health and safety in agriculture – Best practices and proposals for action
25 September 2004	Vocational training, a support for employment in agriculture: Implementation of the European agreement of 5 December 2002 – Report of the GEOPA seminar
5 December 2002	European agreement on vocational training in agriculture
1 April 2001	Safety manual for forestry work
1 April 2001	Instructions for spray operators – Spraying technique, environment and safety
13 April 2000	Final statement of the EFA–GEOPA–COPA conference on 'Employment of agricultural workers in the European Union'
1 January 2000	White Paper: Securing employment through vocational and continuing training in European agriculture
26 April 1999	Rules of procedure for the sectoral dialogue committee on social dialogue in agriculture

Joint opinions of the Joint Committee on Social Problems of Agricultural Workers

24 July 1997	Recommendation framework agreement on the improvement of paid employment in agriculture in the Member States of the European Union
30 March 1995	Joint declaration on employment in agriculture
18 November 1993	Opinion concerning forestry
18 November 1993	Opinion concerning training in agriculture
27 January 1993	Opinion concerning social consequences of CAP reform

Date	Topic of the joint opinion or agreement
27 January 1993	Opinion concerning early retirement for agricultural workers
29 November 1991	Additional clause to the agreement on the harmonization of working hours (persons engaged in crop and livestock farming in Portugal)
19 January 1990	Additional clause to the agreement on the harmonization of working hours of permanent agricultural workers in the [European Community] arable farming sector (application in Spain since 1983)
24 November 1986	Opinion concerning Community action in the forestry sector
24 November 1986	Opinion concerning ancillary sociostructural measures under the common agricultural policy
25 February 1986	Opinion concerning the agricultural statistics
21 December 1984	Opinion concerning safety requirements for attaching, detaching, coupling and uncoupling operations with agricultural tractors
26 November 1982	Opinion with regard to training for agricultural workers
26 November 1982	Opinion on the promotion of relief services in agriculture and the social protection of relief service workers
1 January 1982	Opinion on safety requirements for the construction of agricultural buildings and improvements to installations
27 November 1981	Opinion on the prevention of accidents in agriculture and the relationship between the elimination of technical barriers to trade in agricultural tractors and safety
27 November 1981	Amendment to the agreement on the harmonization of working hours of permanent agricultural workers in the [European Community] arable farming sector
6 May 1981	Opinion concerning surveys of agricultural workers' earnings in the [European Community]

Date	Topic of the joint opinion or agreement
1 January 1981	Opinion on the social aspects of the common agricultural policy
10 June 1980	Agreement on the harmonization of working hours of permanent agricultural workers in the [European Community] livestock farming sector
23 May 1979	Opinion concerning the vocational training of and cessation of farming by agricultural workers in the context of the sociostructural measures proposed by the Commission
22 March 1978	Agreement on the harmonization of working hours of permanent agricultural workers in the [European Community] arable farming sector

Note: The joint opinions after 1997 are from the agriculture ESSDC, while those from 1978 to 1997 are from the Joint Committee on Social Problems of Agricultural Workers.

Source: European Commission, Social dialogue texts database.

Table 38: List of national trade unions included in the study

Member State	Name of the trade union in the original language	Name of the trade union in English	Abbreviation
AT	Produktionsgewerkschaft	Production Trade Union	PRO-GE
AT	Gewerkschaft der Privatangestellten	Trade Union of Salaried Private Sector Employees	GPA
AT	Landarbeiterkammer	Chamber of Agricultural Employees	LAK
AT	Land- und Forstarbeiterbund	Agriculture and Forestry Workers Association	LFB
BE	Centrale van de Voeding, Horeca en Diensten / Centrale Alimentation, Horeca en Services	Food, Hospitality and Services Union	ABVV-FGTB Horval
BE	Algemeen Christelijk Vakverbond / Confédération des Syndicats Chrétiens – Voeding en Diensten	General Christian Trade Union Confederation –Food and Services	ACV-CSC – Food and services
BE	Algemene Centrale der Liberale Vakverbonden van België / Centrale Générale des Syndicats Libéraux de Belgique	General Federation of Liberal Trade Unions of Belgium	ACLVB-CGSLB
BE	Algemeen Christelijk Vakverbond – Puls	General Christian Trade Union Confederation – Puls	ACV Puls
BE	Algemeen Christelijk Vakverbond / Confédération des Syndicats Chrétiens – Centrale nationale des employés	General Christian Trade Union Confederation – National Federation of White Collar workers	ACV-CSC CNE
BG	Федерация на независимите синдикати от земеделието	Federation of Independent Trade Unions of Agriculture	FNSZ
BG	Национална Федерация „Земеделие и горско стопанство” – КТ „Подкрепа”	National Federation of Agriculture and Forestry – KT Podkrepa	NFZGS Podkrepa
CY	Συντεχνία Εργατοϋπαλλήλων Γεωργίας, Δασών, Μεταφορών, Λιμενεργατών, Ναυτεργατών και Συναφών Επαγγελμάτων Κύπρου – Παγκύπρια Εργατική Ομοσπονδία	Cyprus Agricultural, Forestry, Transport, Port, Seamen and Allied Occupations Trade Union – Pancyprian Federation of Labour	Segdamelin – PEO
CY	Ομοσπονδία Εργατοϋπαλλήλων Μεταφορών, Πετρελαιοειδών και Γεωργίας – Συνομοσπονδία Εργαζομένων Κύπρου	Federation of Transport, Petroleum and Agriculture Workers – Cyprus Workers Confederation	Omepege – SEK

Member State	Name of the trade union in the original language	Name of the trade union in English	Abbreviation
CY	Δημοκρατική Εργατοϋπαλληλική Ένωση Εμπορικών και Βιομηχανικών Υπαλλήλων	Democratic Labour Union of Commercial and Industrial Employees – Democratic Labour Federation of Cyprus	Industrial – DEOK
CZ	Odborový svaz pracovníků zemědělství a výživy – Asociace svobodných odborů ČR	Trade Union of Agricultural and Nutrition Workers – Association of Free Trade Unions of the Czech Republic	OSPZV-ASO ČR
DE	Industriegewerkschaft Bauen-Agrar-Umwelt	Industrial Union Construction–Agriculture–Environment	IG BAU
DK	Fagligt Fælles Forbund	United Federation of Danish Workers	3F
DK	Landbrugs- og Tilsynsfunktionærernes Fagforening	Union of Agricultural and Supervisory Officers [authors' translation]	Union of Agricultural and Supervisory Officers
EE	No trade union		
EL	No trade union		
ES	Unión General de Trabajadores – Federación de Industria, Construcción y Agro	General Union of Workers – Federation of Industry, Construction and Agriculture	UGT FICA
ES	Comisiones Obreras de Industria	Workers Commissions – Federation of Industry	CCOO Industria
ES	Langile Abertzaleen Batzordeak	Nationalist Workers' Committees	LAB
ES	Confederación Intersindical Galega	Galician Unions Confederacy	CIG
ES	Eusko Langileen Alkartasuna / Solidaridad de los Trabajadores Vascos	Basque Workers' Solidarity	ELA
FI	Teollisuusliitto	Industrial Union	Industrial Union
FI	Ammattiliitto Pro	Trade Union Pro	Pro
FI	Julkisten- ja hyvinvointialojen liitto	The Trade Union for the Public and Welfare Sectors	JHL
FI	Julkis- ja yksityisalojen toimihenkilöliitto	Federation of Public and Private Sector Employees	Jyty
FR	Le Syndicat National des Cadres d'Entreprises Agricoles	The National Union of Agricultural Managers	SNCEA / CFE-CGC
FR	Union Nationale des Syndicats Autonomie Agriculture et Agroalimentaire	National Union of Autonomous Agriculture and Agri-food Unions	UNSA2A

Member State	Name of the trade union in the original language	Name of the trade union in English	Abbreviation
FR	Fédération CFTC de l'Agriculture	CFTC Federation of Agriculture	CFTC-AGRI
FR	Fédération générale agroalimentaire – Confédération française démocratique du travail	General Agri-food Federation – French Democratic Confederation of Labour	FGA-CFDT
FR	Fédération FO des syndicats des salariés du secteur privé: Agroalimentaire, Agriculture, Artisanat alimentaire, Grande distribution, Hôtellerie & Restauration, Emplois de la famille, Coiffure et Esthétique	FO Federation of Trade Unions of Private Sector Employees: Food Industry, Agriculture, Food Crafts, Supermarkets, Hotels & Restaurants, Family Employment, Hairdressing and Beauty	FGTA-FO
FR	Fédération Nationale Agroalimentaire et Forestière CGT	National Agri-food and Forestry Federation CGT	FNAF-CGT
HR	Sindikat zaposlenih u poljoprivredi, prehrambenoj i duhanskoj industriji i vodoprivredi Hrvatske	Trade Union of those Employed in Agriculture, Food and Tobacco Industry and Water Resources	PPDIV
HU	Mezőgazdasági, Erdészeti, Élelmiszeripari, Vízügyi és Vendéglátó Dolgozók Szakszervezete	Union of Agricultural, Forestry, Food, Water and Catering Workers	Médosz
IE	Services, Industrial, Professional and Technical Union	Services, Industrial, Professional and Technical Union	SIPTU
IT	Federazione Nazionale Lavoratori Agroindustria aderente Confederazione Generale Italiana del Lavoro	National Federation of Agro-Industry Workers, member of the Italian General Confederation of Labour	FLAI CGIL
IT	Federazione Agricola Alimentare Ambientale Industriale Italiana	Italian Federation of Agriculture, Food and the Environment	FAI CISL
IT	Unione Italiana dei Lavoratori Agroalimentari in Unione Italiana del Lavoro	Italian Union of Agri-Food Workers in Italian Union of Labour	UILA UIL
IT	Confederazione Italiana dei Dirigenti Quadri ed Impiegati dell'Agricoltura	Confederation of Italian Agricultural Managers and White-collar Workers	Confederia
LT	Lietuvos žemės ūkio darbuotojų profesinių sąjungų federacija	Lithuanian Federation of Agricultural Workers' Trade Unions	LZUDPSF

Member State	Name of the trade union in the original language	Name of the trade union in English	Abbreviation
LU	Syndicat Bois, Caoutchouc, Céramique, Chimie, Ciment, Papier, Plastique, Textiles et Verre	Trade Union for Wood, Rubber, Ceramics, Chemicals, Cement, Paper, Plastics, Textiles and Glass	OGB-L
MT	No trade union		
NL	Christelijk Nationaal Vakverbond – Vakmensen	Christian National Trade Union Federation – Skilled Workers	CNV Vakmensen
NL	Federatie Nederlandse Vakbeweging	Federation of Dutch Trade Unions	FNV
NL	Vakbond voor Industrie en Dienstverlening - De Unie	Trade Union for Industry and Services - De Unie	De Unie
NL	Het Zwarte Corps	The Black Corps Trade Union	HZC
PL	Niezależny Samorządny Związek Zawodowy Rolników Indywidualnych „Solidarność”	Independent Self-governing Trade Union of Individual Farmers ‘Solidarity’	NSZZ RI Solidarność
PL	Związek Zawodowy Pracowników Rolnictwa	Trade Union of Agricultural Workers	ZZPR
PT	Sindicato Nacional dos Trabalhadores da Agricultura, Floresta, Pesca, Turismo, Indústria Alimentar, Bebidas e Afins	National Union of Workers in Agriculture, Forestry, Fishing, Tourism, Food Industry, Beverage and Related Industries	Setaab
PT	Sindicato dos Trabalhadores da Agricultura e das Indústrias de Alimentação, Bebidas e Tabacos de Portugal	Union of Agricultural Workers and Workers in the Food, Beverage and Tobacco Industries of Portugal	Sintab
RO	Federația Sindicatelor din Agricultură Terra	National Agriculture Trade Union Terra	FSA Terra
RO	Federația Națională a Sindicatelor din Agricultură, Alimentatie, Tutun, Domenii și Servicii Conexe „Agrostar”	National Federation of Trade Unions from Agriculture, Food, Tobacco and Related Fields and Services ‘Agrostar’	Agrostar
RO	Federația Agro Propact	Agro Federation Propact	Propact
SE	Svenska Kommunalarbetareförbundet	Swedish Municipal Workers Union	Kommunal
SE	Unionen	Unionen	Unionen
SE	Naturvetarna	Swedish Association of Professional Scientists	Naturvetarna

Member State	Name of the trade union in the original language	Name of the trade union in English	Abbreviation
SI	Sindikát kmetijstva in živilske industrije Slovenije	Trade Union of Agriculture and Food Industry of Slovenia	SKŽI
SK	Odborový zväz pracovníkov poľnohospodárstva na Slovensku	Trade Union of Agricultural Workers in Slovakia	OZ PP

Source: Network of Eurofound Correspondents, 2022.

Table 39: List of national employer organisations included in the study

Member State	Name of the employer organisation in the original language	Name of the employer organisation in English	Abbreviation
AT	Landwirtschaftskammer Österreich	Chamber of Agriculture of Austria	LKÖ
AT	Obmännerkonferenz der Arbeitgeberverbände der Land- und Forstwirtschaft in Österreich	Standing Committee of the Presidents of the Employers' Associations of Agriculture	OALF
BE	Boerenbond	Farmers' League	Boerenbond
BE	Fédération Wallonne de L'Agriculture	Walloon Federation of Agriculture	FWA
BE	Belgische Federatie Groenvoorzieners	Belgian Federation of Landscapers	BFG-FBEP
BE	Beroepsvereniging voor de Vlaamse sierteelt en groenvoorziening	Professional Association for Flemish Ornamental Plant Cultivation and Landscaping	AVBS
BG	Българска аграрна камара	Bulgarian Agrarian Chamber	BAC
BG	Български фермерски съюз	Bulgarian Farmers Union	BFU
CY	Ένωση Κυπρίων Αγροτών	Union of Cypriot Farmers	EKA
CY	Παναγροτικός Σύνδεσμος Κύπρου	Panagrotikos Association of Cyprus	PAC
CY	Παναγροτική Ένωση Κύπρου	Pancyprian Farmers Union of Cyprus	PEK
CY	Νέα Αγροτική Κίνηση	New Agricultural Movement	NAK
CY	Ευρωαγροτικός	Euroagrotikos	Euroagrotikos
CY	Αγροτική - Παγκύπρια Οργάνωση Αγροτών	Agrotiki	Agrotiki
CZ	Agrární Komora České Republiky	Czech Agrarian Chamber	AKCR
CZ	Zemědělský svaz ČR	Agricultural Association of the Czech Republic	ZS ČR
CZ	Českomoravský svaz zemědělských podnikatelů	Czech–Moravian Association of Agricultural Entrepreneurs	ČMSZP
DE	Gesamtverband der deutschen Land- und Forstwirtschaftlichen Arbeitgeberverbände	Federal Association of German Agricultural and Forestry Employers' Associations	GLFA
DE	Deutscher Bauernverband	German Farmers' Association	DBV
DE	Deutscher Raiffeisenverband	German Raiffeisen Federation	DRV

Member State	Name of the employer organisation in the original language	Name of the employer organisation in English	Abbreviation
DK	GLS-A	GLS-A	GLS-A
DK	Landbrug & Fødevarer	Danish Agriculture and Food Council	L & F
EE	Eesti Põllumajandus-Kaubanduskoda	Estonian Chamber of Agriculture and Commerce	EPKK
EE	Eestimaa Talupidajate Keskliit	Estonian Farmers Federation	ETKL
EE	Eesti Ühistegeline Liit	Estonian Co-operative Association	ECA
EL	Γαία Επιχειρείν	Gaia Epicheirein	Gaia Epicheirein
ES	Asociación Agraria Jóvenes Agricultores	Agrarian Association Young Farmers	ASAJA
ES	Unión de Pequeños Agricultores	Small Farmers Union	UPA
ES	Coordinadora de Organizaciones de Agricultores y Ganaderos	Coordinator of Organisations of Farmers and Ranchers	COAG
ES	Asociación Empresarial de Agricultores y Ganaderos de Almería / Confederación Empresarial de la Provincia de Almería	Business Association of Farmers and Ranchers of Almería / Business Confederation of the Province of Almería	Asempal – Agricultura
ES	Euskal Herriko Nezarien Elkartasuna / Solidaridad campesina de Euskal Herria	Peasant Solidarity of Euskal Herria	EHNE
ES	Cooperativas agro-alimentarias de España	Agri-food Cooperatives Spain	CAA
ES	Asociación Española de Productores de Huevos	Spanish Association of Egg Producers	Aseprhu
FI	Maaseudun Työnantajaliitto MTA ry	Federation of Agricultural Employers	MTA
FI	Maa- ja metsätaloustuottajain Keskusliitto	Central Union of Agricultural Producers and Forest Owners	MTK
FI	Svenska lantbruksproducenternas centralförbund	The Central Union of Swedish-speaking Agricultural Producers in Finland	SLC
FI	Palvelualojen työnantajat – Palta	Service Sectors Employers – Palta	Palta
FR	Fédération nationale des syndicats d'exploitants agricoles	National Federation of Farmers' Associations	FNSEA
FR	Chambres d'agriculture	French Chambers of Agriculture	APCA
FR	La Coopération Agricole	Agricultural Cooperation	Coopération Agricole
HR	Hrvatska poljoprivredna komora	Croatian Chamber of Agriculture	HPK
HU	Mezőgazdasági Szövetkezők és Termelők Országos Szövetsége	National Federation of Agriculture Cooperatives and Producers	MOSZ
IE	Irish Farmers' Association	Irish Farmers' Association	IFA
IT	Confederazione Italiana Agricoltori	Italian Confederation of Farmers	CIA

Member State	Name of the employer organisation in the original language	Name of the employer organisation in English	Abbreviation
IT	Confederazione Nazionale Coltivatori Diretti	National Confederation of Direct Farmers	Coldiretti
IT	Confederazione generale dell'agricoltura	General Confederation of Agriculture	Confagricoltura
IT	Associazione Generale Cooperative Italiane	General Association of Italian Cooperatives	AGCI-Agrital
IT	Lega Nazionale Delle Cooperative E Mutue	National League of Cooperatives and Mutual Societies	Legacoop
IT	Confcooperative Agroalimentare e Pesca - Fedagri	Confcooperative Agri-Food and Fishing - Fedagri	Fedagri
LT	Lietuvos ūkininkų sąjunga	Lithuanian Farmers' Union	LŪS
LT	Lietuvos Respublikos Žemės ūkio rūmai	Chamber of Agriculture of the Republic of Lithuania	ŽŪR
LT	Lietuvos žemės ūkio bendrovių asociacija	Lithuanian Association of Agricultural Companies	LŽŪBA
LT	Lietuvos žemės ūkio kooperatyvų asociacija "Kooperacijos kelias"	Lithuanian Association of Agricultural Cooperatives 'Kooperacijos kelias'	LŽŪKA
LU	Centrale Paysanne Luxembourgeoise	Centrale Paysanne Luxembourgeoise	CPL
LV	Latvijas Zemnieku federācija	Latvian Farmers' Federation	LZF
LV	Lauksaimniecības organizāciju sadarbības padome	Latvian Agricultural Organization Cooperation Council	LOSP
LV	Latvijas Lauksaimniecības kooperatīvu asociācija	Latvian Association of Agricultural Cooperatives	LLKA
LV	Zemnieku saeima	Farmers' Parliament	ZSA
LV	Lauksaimniecības Statūtsabiedrību asociācija	Association of Agricultural Societies	LSA
MT	Koperattivi Malta	Malta Cooperatives	Koperattivi Malta
NL	Land- en Tuinbouw Organisatie Nederland	The Netherlands Agricultural and Horticultural Association	LTO Nederland
NL	De branchevereniging voor de sector plantaardig uitgangsmateriaal	Dutch Association for the Plant Reproduction Material Sector	Plantum
NL	Nationale Coöperatieve Raad	Dutch Council for Cooperatives	NCR
PL	Krajowy Związek Plantatorów Buraka Cukrowego	National Union of Sugar Beet Farmers	KZPBC
PL	Krajowa Rada Izb Rolniczych	National Council of Chambers of Agriculture	KRIR
PL	Polska Federacja Rolna	Polish Agricultural Federation	PFR
PL	Federacja Branżowych Związków Producentów Rolnych	Federation of Industry Associations of Agricultural Producers	FBZPR
PT	Confederação dos Agricultores de Portugal	Confederation of Farmers of Portugal	CAP

Member State	Name of the employer organisation in the original language	Name of the employer organisation in English	Abbreviation
PT	Federação Portuguesa de Associações de Suinicultores	Portuguese Federation of Pig Farmers' Associations	FPAS
PT	Associação dos Agricultores do Baixo-Alentejo	Farmers' Association of Lower-Alentejo	AABA
PT	Associação dos Agricultores do Ribatejo	Farmers' Association of Ribatejo	AAR
PT	Associação de Agricultores do Distrito de Portalegre	Farmers Association of the District of Portalegre	AADP
PT	Associação dos Horticultores, Fruticultores e Floricultores dos Concelhos de Odemira e Aljezur	Association of Horticulturists, Fruit Growers and Floriculturists of the Municipalities of Odemira and Aljezur	AHSA
PT	Associação de Agricultores do Concelho de Grândola	Farmers Association of the Municipality of Grândola	AACG
PT	Associação de Agricultores do Distrito de Setúbal	Farmers Association of the District of Setúbal	AADS
PT	Associação dos Agricultores dos Concelhos de Abrantes, Constância, Sardoal e Mação	Farmers Association of the Abrantes, Constância, Sardoal and Mação	AACACSM
PT	Associação dos Agricultores do Concelho de Vila Real	Farmers Association of the Municipality of Vila Real	AACVR
RO	Federația Națională a Producătorilor Din Agricultură, Industria Alimentară și Servicii Conexe din România "Pro Agro"	National Federation of Producers in Agriculture, Food Industry and Related Services from Romania 'Pro Agro'	Federația Pro Agro
RO	Uniunea de Ramură Națională a Cooperativelor din Sectorul Vegetal	National Union of the Vegetal Sector Agricultural Cooperatives	UNCSV
SE	Lantbrukarnas Riksförbund	The Federation of Swedish Farmers	LRF
SE	Gröna Arbetsgivare	Swedish Federation of Green Employers	Gröna Arbetsgivare
SI	Gospodarska Zbornica Slovenije – Zbornica kmetijskih in živilskih podjetij	Chamber of Commerce and Industry of Slovenia – Chamber of Agricultural and Food Enterprises	GZS-ZKŽP
SI	Kmetijsko gozdarska zbornica Slovenije	Chamber of Agriculture and Forestry of Slovenia	KGZS
SI	Združenje delodajalcev Slovenije – Sekcija za kmetijstvo, živilsko industrijo in gozdarstvo	Association of Employers of Slovenia – Section for Agriculture, Food Industry and Forestry	ZDS
SI	Zadružna Zveza Slovenije	Slovenia's Cooperative Union	ZZS

Member State	Name of the employer organisation in the original language	Name of the employer organisation in English	Abbreviation
SK	Slovenská poľnohospodárska a potravinárska komora	Slovak Agriculture and Food Chamber	SPPK

Source: Network of Eurofound Correspondents, 2022.

Table 40: National correspondents who have contributed to this study

Member State	Correspondent(s)	Organisation
AT	Bernadette Allinger	Working Life Research Centre (FORBA)
BE	Noah Vangeel	HIVA – KU Leuven
BG	Gabriela Yordanova	Bulgarian Academy of Sciences
CZ	Soňa Veverková	Research Institute for Labour and Social Affairs (RISLA)
DE	Thilo Janssen	Hans Böckler Foundation
DE	Sandra Vogel	Cologne Institute for Economic Research
DK	Carsten Jørgensen	Employment Relations Research Centre (FAOS), University of Copenhagen
DK	David Lauesen	Employment Relations Research Centre (FAOS), University of Copenhagen
EE	Miriam Lehari	Praxis Centre for Policy Studies
EL	Elena Kousta	Labour Institute of the General Confederation of Greek Workers (GSEE)
ES	Pablo Sanz de Miguel	University of Zaragoza
FI	Vera Lindström	Oxford Research AB
FR	Frédéric Turlan	IR Share
HR	Predrag Bejakovic	Institute of Public Finance
HR	Irena Klemencic	Institute of Public Finance
HU	Szilvia Borbély	Kopint-Tárki Institute for Economic Research
HU	Nóra Krokóvay	Kopint-Tárki Institute for Economic Research
IE	Rosanna Angel	IRN Publishing
IT	Alessandro Smilari	Fondazione Giacomo Brodolini
IT	Silvio Bologna	University of Palermo
LT	Inga Blaziene	Lithuanian Centre for Social Sciences
LU	Franz Clément	Luxembourg Institute of Socio-Economic Research (LISER)
LV	Kriss Karnitis	EPC Ltd
NL	Thomas De Winter	Panteia
PL	Ewelina Wołosik	Polityka Insight
PT	Reinhard Naumann	University Institute of Lisbon (ISCTE-IUL)
RO	Victoria Stoiciu	Centre for Public Innovation
RO	Nicoleta Voicu	Centre for Public Innovation
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SI	Barbara Lužar	Faculty of Social Sciences, University of Ljubljana
SK	Daniela Kešelová	Institute for Work and Family Research

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This study provides information allowing for an assessment of the representativeness of the organisations involved in the European sectoral social dialogue committee for the agriculture 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 sector. This study identifies the European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT), representing employees, and the Employers' Group of Professional Agricultural Organisations in the European Union / Committee of Professional Agricultural Organisations in the European Union (GEOPA-COPA), representing employers, as the most representative European-level social partner organisations in the agriculture sector.

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

