



MEAT THE STANDARDS



**Improved working and living
conditions in the meat sector
through trade union action**



Funded by
the European Union



#Meat The Standards

This report was drafted with contributions from:
Syndex, WMP Consult, and Gira.



Executive summary

More than 700.000 workers are employed in the meat sector in the EU. More than 700.000 workers experiencing very tough working conditions every day. A sector in need of trade union actions to improve the working and living conditions of a vast majority of the workers.

The meat sector in Europe, compared to other sectors in food production, is still one of the most difficult sectors to work in. It is characterised by precarious jobs, low wages and very difficult working conditions.

Covid-19 and the high infection rate in slaughterhouses brought the needed public attention to the appalling working conditions in the European meat sector. It allowed based on the earlier trade union struggles to finally bring changes to the sector through legislation in some countries and through collective agreements in others. It was as well the moment when EFFAT put the meat sector as a priority on its agenda in order to achieve a European solution to the problems the sector is facing throughout the continent. This was done through exchanges between workers and affiliated organisations, through lobbying efforts towards the European institutions, through research and policy demands¹.

Today in 2024, the picture of the European meat sector is very divers, with very different realities. There are countries with high collective bargaining coverage of the sector, others where negotiations are taking place company by company. Countries in which the model to escape direct employment and employer liability is constructed through subcontracting, others are using temporary agency work and intermediaries, while others again are faced with posting, false self-employment or other constructions.

The economic outlook for the meat industry shows a sector in the EU which continues to consolidate at all levels of the supply chain; moving to bigger livestock farms and slaughter plants, investments into automation and increased border activity. Big players having production sites transnationally without becoming real pan-European groups. Still small and medium sized companies exist in the meat sector, but in some countries the percentage is higher than in others.

This consolidation through acquisitions and closures needs coordinated trade union actions and solutions have to be national and European.

#MeatTheStandards brought together many workers and trade unions over the last two years facilitating exchanges, strengthening solidarity and finding common demands to tackle similar abuses. Since Covid many improvements for the meat workers throughout Europe have taken place on national level. You find in this report examples from Germany, Ireland, Spain, Belgium, the Netherlands and Poland.

Together we can ensure that on national and European level the meat companies and the legislators #MeatTheStandards.

¹ [EFFAT Report Covid-19 outbreaks in slaughterhouses and meat processing plants State of affairs and demands for action at EU level 7 September 2020](#)
[Report: Hungry for fairness: raising standards in the meat sector](#)





Introduction

Working in the meat sector was and still is being employed in a very rough environment, it often means being exploited and treated unfairly, specifically the migrant part of the workforce. The job is intense and physically demanding, characterized by working conditions, such as:

- precarious jobs,
- very difficult working conditions,
- long working hours, shift work,
- low wages and illegal wage deductions
- abusive subcontracting, unregulated intermediaries, temporary agency work,
- health and safety issues in the production lines due to a cold, slippery environment and dangerous working tools, repetitive strain injuries
- very high labour turnover,
- reliance on low paid migrant and cross border workers, often subject to abusive working conditions and undignified accommodation and
- social dumping between Member States, threatening employment in countries with high social standards

A vast proportion of the workforce employed in the European meat sector are mobile workers, in particular cross-border and migrant workers from both inside the EU and third countries. Many of those employed in western European countries come from Central and Eastern Europe (CEE) under the framework of the free movement of workers. Workers from CEE are usually recruited by labour intermediaries who charge them a recruiting fee plus the cost of travel to reach their country of destination. Many of these workers are then employed by temporary work agencies or through abusive subcontracting practices, allowing employers to escape liability. In some countries, subcontractors operate as bogus cooperatives with workers sometimes employed as self-employed. Posting of workers in the framework of the provision of services is still a recurrent practice although limited by comparison with earlier years. The use of letterbox companies to avoid or circumvent applicable remuneration, social security contributions and taxes is also frequent.



Trade unions frequently report wage disparities between the mobile workers and their counterparts directly employed by meat companies. Wage deductions for accommodation, transport and working tools are also often imposed on migrant and cross-border workers.

Due to the low pay and often being abroad only for a certain time, workers use to share overcrowded accommodation which sometimes are even directly linked to their work contract or owned by the employer, whether subcontractor or temporary labour agency.

Those conditions have been the explanation why outbreaks of Covid-19 have been specifically high in slaughterhouses and meat processing companies in some countries. But those high infection rates brought the needed public attention to the European meat sector. It allowed based on the earlier trade union struggles to finally bring changes to the sector through legislation in some countries and through collective agreements in others.

Evidence showed that in countries where collective labour agreements were respected and covered all employees in the sector, fewer workers have tested positive for Covid-19, and where outbreaks have occurred, they have been managed more effectively. This is no coincidence - it shows once more the enormous value of well-functioning collective bargaining systems in ensuring decent working and employment conditions including health and safety protection.

Seen this situation of meat workers over years, it clearly was and still is a sector in need of urgent and serious reform. That is why EFFAT decided to focus on improving the working conditions for the meat workers in Europe, to improve collective bargaining in the sector and reinforce trade union membership.

The need for a European solution to the problems of this sector, next to national measures and legislation is evident. Companies quite easily move throughout Europe in order to use the most advantageous legal framework and escape liability, this results in social dumping from one country to another. Halting these developments is possible through binding European rules and policy measures.

#MeatTheStandards is EFFAT's answer to those challenges by bringing together the workers and trade unions throughout Europe to exchange on the problems and challenges and to propose solutions.





Economic outlook

The meat industry evaluates the sector in the following way²:

The EU27 and UK slaughter industry faces significant margin challenges, which are driving the transition of the industry:

- Ongoing pressure to keep meat prices low, especially in the current cost of living crisis being experienced across the Europe.
- Increased regulatory costs (notably environmental) become difficult to absorb on small slaughter plants.
- Labour shortfall and retention are major factors limiting production.
- Capacity utilisation is a major issue, especially when justifying future investment.

EU industry continues to consolidate at all levels of the supply chain.

- For slaughtering this is the move to bigger slaughter plants, mainly through the closure of small plants, and occasionally through large new plant construction.
- Big plants benefit from investment in new equipment and higher levels of automation, as well as better scale economies.
- Increased cross border activity, with the largest slaughter groups often active in 3-5 countries, but still not pan-EU, and unlikely to become so.

The European meat industry must transition to a more efficient system to remain viable in the future, but long term demand for meat persists, at higher values.

Summary of major issues facing the EU meat sector Old and new supply & demand challenges, negative outlook – especially in the North-West

Following long years of stability, since 2020 the EU meat market has become negative. On top of the long-term issues of anti-meat activism, animal welfare (AW)/sustainability issues and labour shortages, over the past three years we have seen a new big challenge emerging each year, without leaving the previous ones behind:

- The shock of Brexit (2019/20) and ASF (since 2019) was followed by the Covid pandemic (2020/22);
- The recovery from the pandemic starting in 4Q21 - has been broken by the war in Ukraine (since February 2022), the cost inflation (starting in 2H21 and accelerating in 1H22), the energy crisis triggered by the war, and – as a consequence – an overall economic and cost of living crisis currently unfolding at various extent in the different Member States.
- In the background of all these new challenges, in 2022 we have faced a new era of HPAI at a magnitude and with new features that we have never seen before.

Below we summarize the key pressures the EU meat sector is currently facing both from the supply and the demand side, as a consequence of the events described above.



Supply challenges

Direct cost impacts:

- High feed/energy/labour costs
- Negative margins
- Low profitability
- Disease: ASF, HPAI...
- Labour shortages and cost

Societal/political challenges:

- Environmental constraints
- Climate change realities brings sustainability to the forefront
- Farming methods: AW, AMR...
- Ageing farmers
- Generally hostile politics

Demand challenges

On the domestic market:

- CoL crisis, falling consumer disposable income
- Disrupted C-19 recovery
- The crisis of the foodservice sector
- Societal demands
- NGO anti-meat activism

On export markets:

- Slowing Chinese economy
- Global economic weakness
- Geopolitical tensions
- Export bans & protectionism
- Strive for self-sufficiency in African/Asian markets

Please see further insights in the report: European Meat Sector
Production Dynamics in the Slaughter Sector; Gira



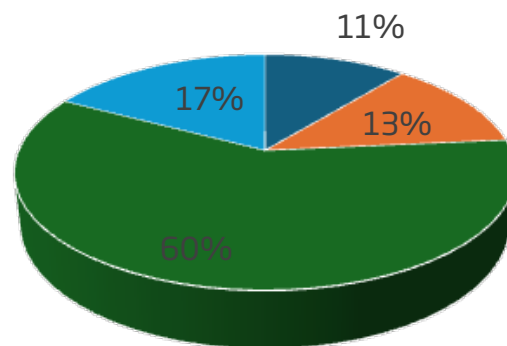
Collective bargaining in the meat sector

EFFAT conducted a survey on collective agreements in 2022. It gives interesting insights. The participation in the survey allows to cover and compare 12 countries, through national sectoral agreements and company level agreements. (Belgium, Sweden, Finland, Ireland, Norway, Croatia, Poland, Italy, France, Denmark, Austria and Albania). As such, the collective bargaining coverage tends to be high in the sample (80%), only Ireland gives a coverage below (33%).

Eurofound shows the collective bargaining levels for the meat sector in the EU 27 as follows:

Collective bargaining levels in the EU 27

- Collective bargaining at Company level
- Collective bargaining at Sectoral level
- Collective bargaining at both levels
- TU not involved in collective bargaining



Source: Eurofound (2022)

While the levels of collective bargaining as reported in the survey are mainly the national sectoral level covering the entire food industry and not specifically meat (BE, Fin, Albania), the national sectoral level specifically in meat (Norway, Italy, Denmark, Austria and France) and the company level (Ireland, Croatia and Poland).

As one can expect complexity and variability of the agreements in Europe make the comparison difficult. Beyond the difference of collective bargaining organisation and history, the difference of industrial relation and worker representation systems limits the comparison (e.g., universal vs blue/white collars). Another limit is the fact that in the meat sector agreements often only cover parts of the sector. France is maybe the best (but far from only) example: you would find at least three different national agreements for the sector: poultry, cattle and meat cooperatives, meat industries and wholesales. Some answers to the survey therefore give only a partial overview.

Looking at the wage structure, the survey results show, as expected, that generally, wages are low compared to national median wage (but this is true for the entire food and drink sector, not only in the meat subsector). Most agreements include lump sum payments, such as payments during the Covid 19, and special allowances for holidays. At the company level, more bonuses are linked with efficiency and quality check (e.g. Animex: bonuses for finding foreign bodies in the product, or to foster presence). Seeing the industrial character of the meat sector, most of the agreements cover specific items on flexible working time, shift work, nightwork, work on weekends (Saturday to Sunday). The level of compensation varies widely.

Concerning working time it can be noted that the meat sector is a sector with a high weekly average working time with 40 hours in a majority of countries of the survey, to be found below this threshold are Belgium and Austria with 38 hours, Finland in some cases with 37,5, Norway with 37,5, Denmark 37 hours and France with 35 hours.

Moreover, rotating shifts, as in most manufacturing industries, is an issue. Interestingly, most agreements regulate the use of shifts: The 3 shift model is the most commonly regulated and addressed, other models (like 5 shifts) are barely addressed.

Another topical issue addressing working conditions is the regulation of speed of production lines, to be found in a significant share of agreements, but not in a majority of them. Ventilation and temperature come second, but most agreements do not include any provisions. Few agreements, according to respondents, cover telework, sick leave, stress at work, work-life balance and equality, this can be explained by the fact that those issues are often covered on sectoral or national level across sectors.

Most sectoral agreements include training provisions. The numbers of days vary and sometimes refer to company agreements. Most agreements do not specify up-skilling and reskilling to tackle digitalisation. Few agreements include provisions on new technologies. Scandinavian countries and Italy have sectoral agreements with such a clause. One company agreement has a provision on change in general.

An important question of the survey looks into subcontracting and temporary agency work. Some collective agreements in the meat sector take up the issues of subcontracting and temporary agency work, in other countries those issues are to be found in horizontal collective agreements covering all sectors.

Some specific examples:

In France a sector specific collective agreement takes up the issue of subcontracting.

The collective agreement ICGV (Meat Industries & Wholesale) has one article dealing with subcontracting intending to create a joint referential on the social aspects of subcontracting in the meat industry, which shall serve as a basis for audits and ensure that recourse to the know-how of service providers is used in compliance with the social rights of workers and the legal context applicable to the subcontracting contract.

In Denmark and Norway the national agreement of the meat sector takes up the issues of temporary agency work and subcontracting.

In Denmark it stipulates that the shop steward may request information about the use of temporary agency work inside the company, especially when it concerns work that could have been carried out by directly employed workers. If a disagreement remains about whether it is temporary agency work, a “clarifying meeting” can be engaged between the management and the worker representation. Furthermore this agreement provides for the transfer of seniority from the temporary agency to the user company should the worker get directly employed.





The worker representatives or the trade union may request from management information on sub-contractors performing work inside the company.

In Norway it is prohibited to hire temporary agency workers due to seasonal variations. It is only allowed to hire temporary agency workers as a replacement for others, such as in case of sick leave, maternity leave, holiday etc.

However, if there is a company collective agreement, it can be agreed between both sides that temporary agency work is allowed for a given determined period.

Does the company need to hire in case of seasonal variations they need to employ the workers directly and only for short periods of time.

Management must inform the worker representatives about the reason for hiring, the number of employees to be hired, which tasks will be performed and how long the relationship will last. A negotiation meeting must be called between the company and the workplace reps before hiring can take place. The company must provide the necessary documentation, so that the workplace representatives can check that the hiring relationship is in line with legislation and contractual agreements as regards the background and possible scope of the hiring. Temporary agency workers have the right to the same salary and working conditions, as if they were hired directly by the company. The user undertaking must provide the temporary agency with the necessary information so that equal treatment can be guaranteed.

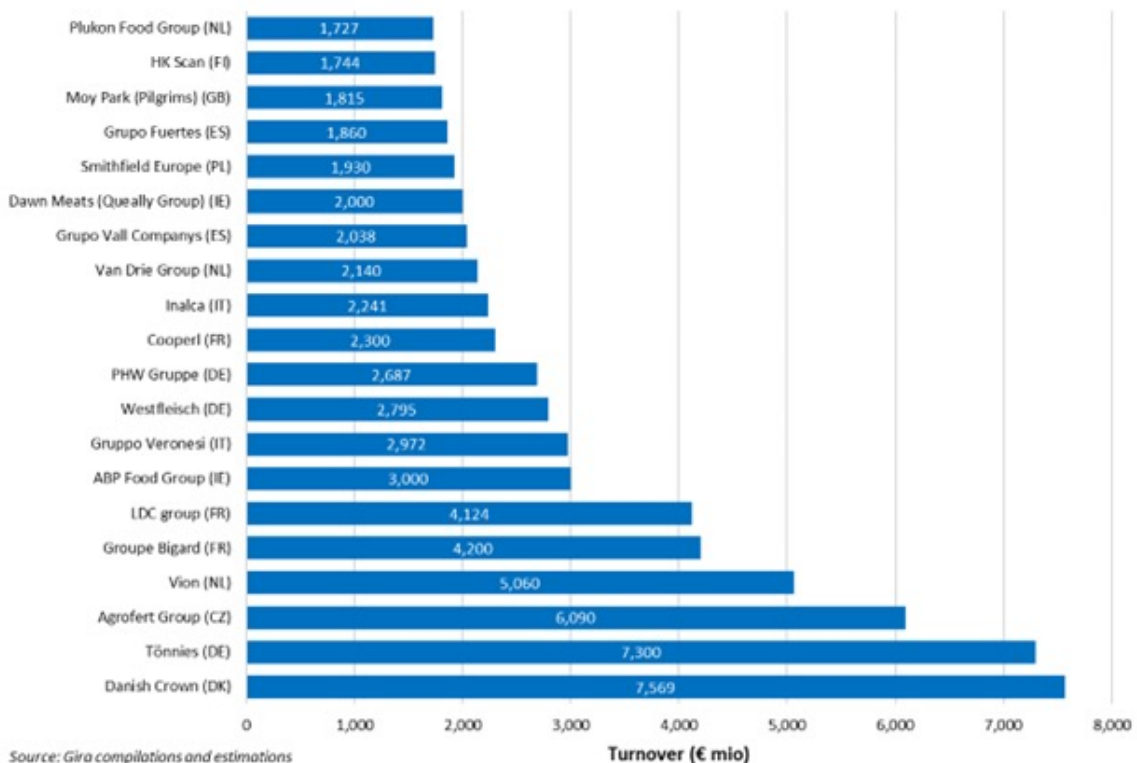
Sweden has a specific cross sectoral collective agreement on temporary agency work ("Staffing agreement"). It sets out all the minimum conditions for temporary agency workers. Only temporary agencies part of this collective agreement are able to contract workers into a user company³.

For the collective bargaining systems in other European countries please consult also our EFFAT [report Covid-19 outbreaks in slaughterhouses and meat processing plants State of affairs and demands for action at EU level](#).

EWC's as a trade union tool in the meat sector

It is evident that the slaughtering industry is dominated by a small number of large groups, which are becoming increasingly consolidated. Some of the major players are expanding across borders.

This is precisely the context in which trade unions should exercise their transnational information and consultation rights, as guaranteed by the European Works Council Directive.



Major European companies - European slaughtering industry continues to consolidate: Poultry the winner this decade

The last decade has seen a considerable scaling-up of the leading EU slaughter groups, as economic pressures have driven them to look for increased economies of scale. The trend is far from over.

- Whilst the leading companies in the EU have consolidated and grown, there is still a considerable tail of small slaughter companies and plants.
- There has been an increase in the number of large slaughter plants in the last decade, as the major groups have consolidated their

own activities. A process driven by the need to look for efficiencies.

- Small groups have decreased in number, either absorbed by their competitors, or merging, to achieve critical mass.
- There are still no truly pan-EU companies in slaughtering, although several are now semi-international (3 - 5 countries). The fundamental preference of the EU 'consumer' for 'locally' producer meat, at least at retail, supports domestic production.

The poultry industry, specifically the broiler industry has been a notable winner, driven by increased demand, and also by the efficiencies in scale.

- M&A has seen the formation of several very large chicken groups.
- 2 out of 5 of the Top companies are chicken specialists, none were in 2011.
- Several red meat groups have also added chicken to their product list. This reflects a move to look for synergies in distribution and a belief in being able to offer buyers a full meat range... that is increasingly including meat free products!

The industry faces increased pressure, as consumers and governments across the EU demand more accountability and sustainability from the food supply chain.

- This will continue to add cost at almost every level, and decrease efficiencies. Requiring reinvestment in measures based on welfare, the environment and sustainability.
- Rising labour costs, and a falling pool of available labour is a challenge for all, amplified by both Covid and the Russian invasion of Ukraine. European companies will continue to use immigrants, not just from other EU nations, but outside the EU, to man the slaughter plants.
- Part of the solution is increased automation, offering less, but more skilled jobs, whilst addressing some issues around labour supply.

The outlook is therefore a continuation of the recent trends, the acquisition of smaller groups by the bigger competitors, a consolidation of activity into fewer, larger slaughter plants, and an increased need to perform at export: to complement the all-important domestic market position.

Source: European Meat Sector - Production Dynamics in the Slaughter Sector; Gira

A quick snapshot of the EWC landscape in the meat sector shows the following picture.

The following companies have an EWC in place: Danish Crown, Westfleisch, Plukon food group, Cargill, LDC and HKScan, some since many years others very recently.

Company name	Law	Year of establishment	Company development in 2024
Danish Crown	Denmark		Closure of sites in Denmark
Westfleisch	Germany		
Plukon	Netherlands		Big expansion through acquisitions
Cargill	Netherlands		
HKScan	Finland		Restructuring, selling parts of the business
LDC	France	2024	<u>The key highlights of the EWC agreement are:</u> 1. Four Meetings Annually: The EWC will hold four meetings per year, consisting of two face-to-face plenaries and two select committee sessions conducted online. 2. Involvement of External Experts: The EWC is entitled to be assisted by an external expert. 3. EFFAT Presence: EFFAT will be actively involved in the EWC for an initial two-year term, with the possibility of renewal. 4. Emphasis on Information and Consultation: The agreement prioritizes effective information and consultation processes to ensure the involvement of trade union and workers representatives in company decision making. 5. Acquisition in Poland

Source: EFFAT database

In progress:

The 2SistersFoodGroup is in the process of setting up an EWC. Due to the resistance of the company the EWC was not established before Brexit after an initial request in 2015. The EFFAT affiliate Unite the Union took this case up again in 2022. To achieve the establishment of an EWC the case was brought to the Central Arbitration Committee (CAC). It was ruled that the establishment must take place, as the procedure had started well before Brexit. Even so the company remained very resistant to an EWC, negotiations are now ongoing. It will be an EWC with members from the UK, the Netherlands and Poland.

There are a number of undertakings which fulfil the legislative criteria for the establishment of an EWC but which for the time being from a trade union perspective are not mature for the formal process of establishing an EWC. EFFAT and its affiliates will continue monitoring the situation very closely and use the opportune moment to launch the set-up of EWCs.

Company name	Headquarters	Number of employees	Type	Countries operating in (EU only)	Company behaviour 2024
Vion	Netherlands	7,974 (Statista, 2021)	Private company	Netherlands, Germany, Belgium	Selling and closing of German sites
Tonnies	Germany	15,200 (Company report, 2021. Figure is worldwide)	Private company	Denmark, France, Poland, Spain, Germany	Expansion, but a very difficult counterpart
Cooperl	France	7,700 (Pitchbook, 2024. Figure is worldwide)	Private company	France, Netherlands, Hungary	
ABP	Ireland	13,300 (Linkedin, 2024)	Private company	Ireland, UK, Poland, Spain, Denmark, Austria, France, Germany, Netherlands	
PHW Group	Germany	10,506 (Company website, 2024)	Private company	Germany, Poland, Bulgaria, Netherlands	
Scandi Standard	Sweden	3000 (Company website, 2024)	Publicly listed company	Sweden, Denmark, Norway, Finland and Ireland	
Source: Syndex					



What trade union actions did achieve to improve working and living conditions of meat workers *examples from different countries*

What has been achieved in Belgium? – An example of a mix of solutions through social partnership and legislation

The potential abuse associated with subcontracting in the meat sector is one of the biggest challenges for the trade unions in Belgium.

Several years ago a specific legislation for the meat industry to fight social dumping and illegal work was obtained, it included, amongst others the following measures: all workers entering a meat factory, including independent workers or workers of a subcontractors must register (check-in at work) through a digital application set up by the public service for social security; subcontractors in meat factory must declare their activities through a digital application set up by the public service for social security; when subcontractors do not pay social contributions to social security or the right wages to their workers, the main company can be held financially responsible; prohibition of salary payment in cash and a special attention from the social inspection on the meat sector, as well as regular meetings with social partners.

In November 2022, the Belgian social partners were informed about a series of measures defined by the government in the fight against social fraud in the food sector. The strategy is one of substitution, by strengthening employment, utilizing temporary employment to cope with workload fluctuations, and achieving a work organization in consultation and tailored to the needs of the sector. This policy can succeed only if it is connected to adequate accompanying measures.

In January 2023 the social partners agreed on a roadmap of measures over the next 7 years. They suggested a plan-based approach to provide a systematic solution to the current practice of subcontracting and agencies in the food sector.

The social partners recognise the following challenges in the sector: - The structural labour shortage for the specific positions in the sector, which is also occurring abroad. - Demand for increased flexibility due to the nature of the product, with limited shelf life. - The potential abuse associated with subcontracting. - The weak competitive position of the Belgian meat sector, both in Belgium and abroad. - The objective with regard to subcontracting should be a policy of substitution by strengthening direct employment, direct temporary employment to cope with peaks and work organisation that is consulted and tailored to the needs of the sector. This policy can succeed only if it is linked to adequate accompanying measures to avoid compromising continuity in meat processing plants and if it takes into account the other challenges outlined.



For the social partners, it is extremely important that the measures worked out result in: 1. legal certainty based on well-defined criteria and clearly framed controls, 2. increased social justice with a focus on social fraud and human trafficking, 3. putting fair competition at the centre.

At national level, several EU member states, have implemented measures regarding subcontracting liability for wages, as well as health and safety in the workplace. These measures aim to safeguard fair competition and protect workers within subcontracting chains. Belgium stands out as a notable example with an extensive system of chain liability. In Belgium, meat workers employed through subcontractors, whether posted or not, are entitled to at least the minimum wage agreed upon at the sectoral level for the Belgian meat sector by social partners (EFFAT 2020).

The joint liability scheme in Belgium, provides protection for employees of subcontractors against unpaid wages. This scheme applies to nine sectors, including the meat industry. If a subcontractor fails to pay wages on time, the main contractor may be held jointly liable for unpaid wages, encouraging meat companies to engage with reliable subcontractors.

If a serious breach is detected, the social inspection sends a written notification to the client and/or subcontractors of the responsible subcontractor.

Trade union action and a specific legislation protecting workers in the slaughtering sector – the German example

With the unfolding of the COVID19 pandemic, the numerous infections among workers in German slaughterhouses in Spring 2020 have drawn the attention of a wider public and shifted the political focus on to the conditions in the industry.

In spring 2020, there was finally enough political pressure on the issue for the federal government to launch a package of legal measures: the Labour Protection Control Law for the meat industry (ASKG) whose core was the complete ban on service contracts in the industry. This applies to the core area of the company's activities - i.e. the slaughtering, cutting or further processing of meat. In other departments of the company, such as packaging, logistics, transport, etc., work may continue to be carried out through service contracts.

Main provisions:

- Subcontracting and, temporary agency work are prohibited in key areas of the meat industry (slaughtering, cutting, and processing).
- To ensure compliance with minimum wage regulations, employers are obliged to digitally record working hours.
- Authorities are set to increase their inspections through predefined inspection quotas.

The law provides for a complete ban on the use of temporary work in the areas of “slaughtering and cutting”. Companies in the meat processing sector were still allowed to use temporary agency work within narrow limits - max. 8% of the annual workload - under the conditions of equal pay and equal treatment from the first day and only for companies covered by collective agreements. This exception was after its time limitation until 2024 as well prohibited. It had been hardly used by the companies. This shows that in one of the most important meat producing countries in Europe, work can be done through direct employment and without subcontracting and temporary agency work. This is a really positive sign for all neighbouring countries, as Germany had been a source of social dumping and unfair competition in the meat sector over many years.

The ASKG also foresees electronic registration of working time which makes maximum working hours and rest periods for workers enforceable and controllable by state authorities. The penalties for companies in the event of infringements of occupational health and safety laws have been significantly increased.

The question of improving the living conditions in housing was not conclusively regulated in the ASKG; further formulations are still necessary here, which also depend heavily on the implementation and controls of the individual German regions.

The ASKG is probably the toughest legal intervention in recent years aimed at re-regulating a German industrial sector. Within a short period of time, the core of the exploitation system, the outsourcing of barely controlled subcontracting companies, was eradicated leading to a gradual return of companies' responsibility for their workforce.

At the same time, this change massively strengthens the position of the works councils, as they can now represent the interests of the entire workforce and exercise control and supervision throughout the company.

In parallel to the new legal regulation, the trade union NGG succeeded in concluding a nationwide collective agreement with the employers' side on an industry specific minimum wage in June 2021, after tough negotiations and industrial action. This started at 11 €/hour and rising to 12.30 €/hour. The industry specific minimum wage has been declared generally binding and became obligatory for the entire industry with its 160,000 employees.

The legislation has led to notable outcomes and a positive balance of the new rules can be drawn:

- About 35,000 subcontracted workers were hired directly by the companies, and the service companies were completely taken over and dissolved.
- Thanks to digital working time recording, massive working time violations, with working hours of up to 16 hours a day, no longer occur.
- According to our findings, temporary agency work does not seem to be used by meat processing companies to the extent initially claimed by the meat lobby.

The German government carried out an [evaluation of the law](#), it showed that the legislation was not disruptive to the German meat industry, but on the contrary the evaluation results make it clear that the new legal regulations in the meat industry were necessary, appropriate and proportionate.



Certain aspect have yet to improve:

- Numerous renovations were carried out by companies, but sector-wide concerns persist, including overcrowded accommodations and deficiencies in hygiene standards, equipment, access to electricity and water, as well as fire safety measures. The costs for a place to sleep are still often overpriced.
- Former subcontractors continue to play a role in recruiting and accommodating.
- The workers are still often confronted with persisting problematic leadership structures, even as employees directly employed. Former contact persons of intermediaries have been made foremen and managers inside the companies with minimal scrutiny.

Although the situation improved overall, many problematic aspects still persist in the sector. These have little to do with the objective and the tightening of the regulations by the ASKG, but rather with the lack of implementation, the still uncompleted transformation processes, and the replacement of the former subcontracting companies in recruiting, accommodation and other activities. It is problematic, for example, that workers of the former subcontracting companies who were employed in foreman functions continue to carry out their activities in the German companies where they are now employed. As a result, authoritarian manners, harassment, verbal violence or activities still persist. It is also problematic that the recruitment of workers, mainly in Eastern European countries, continues to be organised by the former subcontracting companies for the German companies.

It is indispensable for the implementation of the provisions of the new law to increase the control pressure on the companies in the sector. To this end, the staffing possibilities of the state supervisory authorities must be significantly expanded.

The overall balance from the perspective of the NGG trade union is positive, the basic structure of the former business model - service contracts - has been banned and the situation of foreign workers in the industry has improved in terms of occupational health and safety, representation by trade union and works council.

Since the law came into force, the NGG trade union has been in a better position to improve the working conditions and pay of workers through collective agreements. The reconstruction of collective bargaining structures is only just beginning, as there has been a decades-long decline in collective bargaining structures due to the exploitative system.

The German example shows: consistent re-regulation of the industry is indeed possible, does not lead to stalling or delocalisation of the industry and improves people's living and working conditions.

Protection of workers abroad and regulation of cross-border recruitment agencies – an example of legislation from Romania

In April 2021, The Romanian parliament enacted an amendment to Law 156/2000, governing recruitment activities, with the aim of protecting the Romanian labour force. The legislation imposes a set of regulations on companies based in Romania engaged in cross-border labour recruitment. The law applies to all intermediaries placing workers from Romania.

Key provisions of the law include mandatory certification and accreditation by the Ministry of Labour for all companies engaged in cross-border labour recruitment. Services for employees must be provided without agency fees to the Romanian recruiting company. Regular checks are conducted to assess the seriousness, economic basis/creditworthiness, and reliability of these companies as employers. The declaration of agency operation conditions, such as who bears the agency fees, is mandatory, and the use of other service providers is prohibited.

Moreover, the recruiting agency is obligated to provide written employment contracts to the employee in both the language of the host country and the native language before departure. A written placement contract with the jobseeker, including a direct job offer to the Romanian agency, is also a requirement.

For seasonal workers, contracts must also include a rental agreement with accommodation details and a declaration from the employer, confirming compliance with minimum health and safety standards. If the employer provides accommodation and meets the general health and safety standards of the receiving country, seasonal workers may be required to contribute to accommodation costs, not exceeding 25% of their remuneration.

The legislation approved by the government introduces additional obligations and strengthens sanctions for non-compliance, imposing penalties for violations resulting in fines totaling several thousand euros.

Workplace Inspections Conducted by Specially Trained Social Inspectors – a Belgium and Dutch example

Both Belgium and the Netherlands are examples, where specially trained social inspectors are actively dedicated to conducting workplace inspections, particularly in sectors prone to labour abuse of migrant workers, including unfair recruitment.

Rights and responsibilities of migrant workers and their employers relating to recruitment are governed by the Foreign Nationals Employment Act in both Belgium (1999) and the Netherlands (1994), guided by EU Directives (including Directive 2009/52/EC on sanctions and measures against employers of illegally staying third country nationals, and Directive 96/71/EC on posting of workers).

In case of employer negligence or serious violations, social inspectors issue demands for regularisation, and if ignored, formal reports are submitted to the public prosecutor. Penalties, depending on the severity of the violations, may involve criminal penalties or administrative fines, with potential imprisonment and substantial financial penalties.

In both countries, the availability of well-trained inspectors is crucial for comprehensive inspections, including workplace visits, interviews, evidence gathering, follow-up visits, consultations with various stakeholders, and document reviews.



A collective agreement on housing for migrant meat workers an example from the Netherlands

The widespread use of agency workers in the Netherlands poses a significant challenge. The FNV consistently raises concerns about the treatment of migrant workers employed by agencies, those on temporary contracts, and self-employed. One notable issue is related to housing rights abuse, particularly overcharging, for workers provided housing by their employers.

Trade unions and other organizations are actively working to improve conditions. In June 2022, a 2-year collective bargaining agreement was signed between The Dutch Central Association of the Meat Industry (COV) and trade unions. This agreement addresses various key issues, including pay, with a 7% basic increase implemented.

Additionally, a collective agreement negotiated by the Dutch Trade Union FNV and the Dutch Central Association of the Meat Industry goes beyond income provisions. It includes agreements aimed at enhancing the status of temporary agency workers and migrant workforce in the meat sector. For example, foreign workers are entitled to housing and income guarantees.

The housing standards for foreign employees in the Dutch meat sector include the following provisions:

- 1. Minimum Wage Entitlement:**

Foreign employees arriving in the Netherlands are entitled to receive the minimum wage, regardless of their employment contract duration or worked hours.

- 2. Accommodation Duration:**

After the termination of their employment, foreign employees can continue residing in the accommodation provided by the respective company for an additional four weeks.

- 3. Direct Employment:**

Temporary agency workers who have served a meat company for over five years and have established permanent residence in the Netherlands in their own accommodation can be directly employed by that company.

- 4. Certified Housing:**

Meat companies are obligated to ensure that temporary employment agencies and specialized rental firms offer workers only certified housing that meets the standards. These housing locations undergo administrative inspections to verify compliance with good employment practices, supervision, and management.

All these measures aim to create better working conditions and protect the rights of workers in the meat industry.

Achievement of sick pay for workers in Ireland due to trade union pressure

The Irish meat sector has followed a particular path of development: relatively low wages, long working hours in the context of poor collective bargaining rights (ICTU, 2021).

Union density across the meat sector is lower than in other sectors of manufacturing according to SIPTU, the main union in the sector. SIPTU have identified the poor collective bargaining rights which prevail in Ireland as the major barriers to union organizing in the sector. There are some companies where SIPTU has collective agreements and bargains on pay and terms and conditions. In these companies, SIPTU have been able to achieve pay and terms and conditions which are better than the national average.

No sectoral bargaining exists outside of the company level agreements. Since the fall of national bargaining through Social Partnership, there has been no tri-partite arrangements in the Irish economy. Some sectors of the economy do have sectoral arrangements in place, such as the construction sector.

SIPTU is the largest trade union in Ireland, and the largest union in meat sector. As such, it is a key player in the Irish Congress of Trade Unions who made the following recommendations in 2021:

- Ensure that meat workers and their trade unions are represented in all fora discussing the future of this sector.
- Seek to improve workers' terms and conditions and support and promote collective bargaining in this sector, including by introducing a social clause that ensures that business support measures are conditional on trade union recognition and access.
- Implement the recommendations concerning the meat sector set out in the Final Report of the Oireachtas Special Committee on Covid-19 responses, particularly those concerning the introduction of sick pay, reviewing the role of employment agencies and establishing a task force to examine the terms and conditions of workers in this sector; propose legislation banning sub-contracting and bogus self-employment.

The employers' organizations have little contact with the trade unions representing workers in the sector. Following a major campaign by SIPTU, Ireland's largest trade union, the employers' organization agreed a charter for the sector covering issues related to health and safety during the pandemic. This charter was a landmark development, agreed between SIPTU and Meat Industry Ireland, which represents the majority of employers in the sector and is member of IBEC, the main employer's body in Ireland.

Until 2020, 90% of workers in the meat processing industry in Ireland lacked the entitlement to a sick pay scheme, leading to a significant impact on the spread of COVID-19 in the workplace. Consequently, the Services, Industrial, Professional, and Technical Union (SIPTU) launched a campaign in 2022 advocating for safer working protocols and the implementation of statutory occupational sick pay through a national safety protocol agreement with the Meat Industry in Ireland. In September 2022, legislation on occupational sick pay provision was enacted (EFFAT 2022; Irish Statute Book 2022).

The Sick Leave Act, effective since January 2023, introduces the right to statutory sick pay (SSP) for employees in Ireland for the first time (for detailed information see A&L Goodbody 2023; Stapleton 2022). All employers in Ireland are now obligated to make minimum mandatory sick payments to their employees. Starting from January 2024, this entitlement increases to five days of paid leave, further rising in 2025 (seven days) and 2026 (10 days).



High employment standards and collective bargaining coverage a Danish example

The Danish meat industry stands in a unique position with an exceptional level of trade union organisation, where 90% of workers are affiliated with trade unions, and the coverage of collective bargaining approaches close to 100%. This implies that national collective agreements are effectively applied universally, covering all workers in the meat industry (EFFAT 2020; Erol/Schulten 2021). Approximately 25-30% of the workforce in Danish slaughterhouses and processing plants comprises non-Danish workers, with migrant workers being directly employed by the companies.

However, it's noteworthy that subcontracting of employees does not play a role in Danish slaughterhouses, and there is no trend towards a dualisation of the workforce, as seen in Germany. Newcomers in Danish slaughterhouses and non-Danish workers are organised to the same extent as Danish citizens. So, Danish trade unions have successfully organised the increasing proportion of foreign workers, opting not to engage in concession bargaining. The chosen trade-off is fewer jobs but jobs with fair wages and working conditions, made possible by a high level of unionisation, strong solidarity among Danish trade unions, and comprehensive collective bargaining coverage (Navrbjerg 2020).

While subcontracting is not prohibited in Denmark, meat companies can utilise workers sourced via agencies and subcontractors. However, these workers must be remunerated at the same wage levels as directly employed staff, ranking among the highest in the European industry. Consequently, there is no financial incentive for companies to source workers from intermediaries. Subcontracting practices are regulated by the collective agreement and agreements between NNF and the Confederation of Danish Industry concerning the food industry, including the meat sector.

A major challenge for the sector in Denmark is the pressure created by the conditions which prevail elsewhere, namely the fear of unfair competition and a fear of job losses to other countries.

A mix of legislation and collective agreement – the achievements of the Spanish trade unions?

At the end of 2021 a sectoral collective agreement was signed - the State Collective Agreement for Meat Industries 2021-2023. It entered into force only seven months after it was signed by employers' associations and trade union organisations. It is valid from 1 January 2021 to 31 December 2023 (although it will remain in force until negotiations of the agreement that replaces it are reached). We are currently negotiating the new agreement.

This collective agreement covers everybody employed in the sector (more than 100,000 workres) approximately distributed in 3,000 work centres. The agreement covers the following areas: reduction of working time, wage increases, days off in case of serious illness or death of father, mother or descendants, if the trip is outside the country, at least ten days' leave can be taken, of which six shall be paid, translation of most important communications into the mother tongue of the worker (for a certain time period), telework, night bonus, etc. In short, it regulates practically all employment matters.

Evolution of the sector and challenges found: The case of bogus self-employment, subcontracting and immigrant workers

The social dialogue that exists and has existed in the meat sector is today limited to the scope of collective bargaining, i.e., there is no social dialogue beyond the functions of the Negotiating Committee and the Joint Committee. There have been attempts to address other issues by trade union action, but neither the employers nor the government have been receptive to this. However, within collective bargaining, the assessment of the evolution of social dialogue in recent years is positive. Especially since the COVID-19 crisis. Earlier, we discussed how the labor inspectorate and trade union initiatives addressed the issue of falsely self-employed workers. This led to a social dialogue table involving trade unions, employers, and the government. The aim was to find mutually agreed solutions within this commission. However, due to various interests that did not align with those of the workers, this did not deliver.

The COVID-19 crisis is considered to have strengthened the meat sector, because it was considered, like the entire agri-food sector, an essential sector, and from that moment on, the social actors have noticed that more importance has been given to it and to the workers and their working conditions. In fact, the negotiation of the current 2021-2023 agreement was born in the post-COVID context and was established as an agreement that gave security and strength to the social part of the sector. Even in some companies, where there is significant trade union representation, agreements have been reached to improve the agreement after COVID-19 and, in general, membership has increased over the last year.

One of the major challenges for trade union action in the sector in recent years has been related to false self-employment. This situation is common in an important part of the meat sector in Spain, especially for migrants, who have greater difficulties in finding employment and are more vulnerable to abuses by companies. In the case of the meat sector, the construction was through false cooperatives: it is inserted in a mechanism of subcontracting activities.

Spanish trade unions achieved notable successes in recent years, contributing to the approval of a new national labour reform, enacted by the Spanish parliament in February 2022.

The updated regulations indicate the end of irregular and excessively long working hours in the Spanish meat sector, establishing a maximum of nine ordinary hours of effective work per day (EFFAT 2022). Moreover, the law particularly emphasizes the reinstatement of sectoral collective agreements, which now take precedence over company or smaller territorial agreements. The latter can only be applied if the contractor or subcontractor has their own agreement aimed at improving conditions within the sector. Presently, agreements negotiated across a sector establish a baseline from which individual companies can negotiate upward.

To curb the misuse of subcontracting and outsourcing, service companies are now obligated to adhere to the working conditions and salaries established in the sectors in which they operate. Consequently, these reforms ensure that subcontracted workers are automatically covered by sectoral agreements.

Progress has also been made in addressing the substantial number of temporary workers in the country. The deal seeks to eliminate the abuse of temporary employment. Employment contracts are now presumed to be indefinite by default, temporary employment is possible for two reasons only: production circumstances or employee replacement. Fixed-term contracts are permissible only under strict circumstances (Occasional and unpredictable increases and oscillations in activity, replacement of annual leave, to address occasional, foreseeable situations with a limited duration).

The reform also introduces permanent seasonal contracts for seasonal work and solidifies short-time work as a labour market policy instrument during crises. Furthermore, the inspectorate responsible for monitoring has been strengthened, and sanctions against employers engaging in such practices have been intensified. To promote compliance, the government has raised the fine for companies hiring a worker outside the law from 7,500 to 10,000 euros.





Additionally, the law outlines training arrangements for alternating work and training, ensuring that remuneration for internship contracts can never be lower than the minimum wage. However, the protection against dismissal was not further reinforced, a strategic move aimed at securing employer support.

Outsourcing has been used more recently. Companies other than the parent company are created for certain activities in the sector, or staff are outsourced to service or multi-service companies. Increasingly, these companies are becoming the perfect employment bargaining chip for many companies in the sector: outsourcing is not illegal and saves costs. For the workers, it means a devaluation of the working conditions of the sector's collective bargaining agreement to those established in the multiservice company's own collective bargaining agreement.

Thus, one challenge is still present and the trade unions by means of the collective agreement, want to achieve the prohibition of outsourcing of the core meat activity, a cost-saving technique that distorts competition in the sector and introduces a wage differential that penalises the workers and the companies that take over this activity with their staff. This needs to be done through legislative changes, by reforming the regional cooperative laws: by clearly specifying the conditions of the relationship between the cooperative member and the employee and by preventing the organisational consolidation of the cooperative as a mere wrapping that distorts labour relations.

Organising in Poland

EFFAT believes there is big organising potential in the European meat sector and good prospects for growing union membership and union power. Pressure to improve the wages and working conditions of workers in the sector has never been greater. European coordination is vital because of most of the market is now controlled by a relatively few multinational corporations, creating a need for a cross-border approach.

The Sokolow project was launched in June last summer, in cooperation with two of our affiliates in Poland, MZZP/OPZZ and Solidarność. The project is run by COZZ, and the overall objective of this initiative is to strengthen the organising capacity of our affiliates that will take part in the project, support them in increasing their existing membership, improve working conditions and negotiate a company agreement for all Danish Crown operations in Poland. The Campaign will be an additional push to promote our demands on labour mobility and migration.

The project has already had very positive impact, but some issues such as intimidation and union busting have also been identified. Several training sessions have been organised getting members familiar with planning, mapping, and taking participants with new skills and techniques to organise their workplaces. We have seen an increase of almost 500 new members from 900 to 1400 since we started our organising project in 2023.



Effat's Action at European Level

The very high infection rates of meat workers during the Covid-19 pandemic gave the meat sector the negative publicity needed in order to have high media attention on the industry. This was the right moment to push demands for improvement as well on European level.

EFFAT reacted directly with a [report](#) "EFFAT Report Covid-19 outbreaks in slaughterhouses and meat processing plants State of affairs and demands for action at EU level 7 September 2020" outlining the sector situation in regard to Covid-19 across various European countries. It also provided an overview of the work arrangements and business practices pursued by meat companies to cut costs and escape employer liability.

The policy demands set out already in this first report have been further developed and formally adopted by the EFFAT Executive in September 2020 - [Hungry for fairness: raising standards in the meat sector EFFAT's 10 demands for action at EU level](#).

Departing from these 10 policy demands EFFAT developed over 2 ½ years jointly with its affiliates a proposal for a Directive tackling the issues, which are the most widespread throughout the different countries. It clearly emerged that the low proportion of directly employed workers in the meat sector was one of the main reasons of low wages and bad working conditions. Many initiatives (as described above) have been taken on national level through legislation and collective agreements to improve the situation of this vulnerable workforce. But a sustainable solution will only come into reach if next to the changes on national level, there will as well be EU wide rules. Companies have too well demonstrated their strategy over the last years - moving across borders to take advantage of the most favourable legal framework for their business plan and cheapest production.

For EFFAT a European solution needs to come with binding legislation on subcontracting, labour intermediaries and improved inspections; only this can move the meat sector back towards direct employment and good working conditions and wage levels.





EFFAT proposal for a Directive on labour intermediaries and fair working conditions across subcontracting chains

EFFAT has developed a proposal for an EU Directive on labour intermediaries and fair working conditions across subcontracting chains. This piece of legislation has three key aims:

- Ensuring equal treatment across subcontracting chains
- Regulating the role of placement agencies and other labour intermediaries as well as addressing the main shortcomings of the Temporary Agency Work Directive
- Increasing frequency and bolstering effectiveness of labour inspections

Migrant, seasonal and other mobile workers often access the labour market through an informal and non-transparent recruiting process carried out by labour intermediaries whose activities remain largely unregulated. These actors provide the link with the employer while charging workers significant fees, often paid through debt, trapping them in a poverty spiral from which there is no escape. In the worst cases, informal labour intermediation ends up in gang mastering.

Unregulated labour intermediation often goes hand in hand with abusive subcontracting. While subcontracting should ideally involve specialised expertise, there is evidence that it is increasingly used for core business activities. Subcontracting allows employers to circumvent applicable labour standards and collective agreements while cutting costs and avoiding liability. This means longer working hours, lower wages and greater insecurity for workers throughout the subcontracting chain.

If companies do not abide by the rules, they are likely to engage in illegal practices that violate applicable working conditions and lead to social dumping and unfair competition. Labour inspectorates across the EU are underfunded and understaffed. Particularly in EFFAT sectors, where small and micro-enterprises are in the majority, this means less frequent inspections.

Therefore the Directive needs to:

Establish full equal treatment throughout subcontracting chains: by prohibiting subcontracting for companies' core activities, by limiting the chain to one sub-level, by applying joint and severe full-chain liability and by tackling social and collective bargaining dumping.

Regulate the roles of all labour intermediaries and address the shortcomings of the Temporary Agency Work Directive by establishing an EU register and a community licence for labour intermediaries, by ensuring that workers do not pay fees and that brokers provide information for workers in different languages.

Increase the frequency and effectiveness of labour inspections across the EU by adopting common standards for inspections, using the ILO benchmark of at least one labour inspector per 10,000 workers as a minimum threshold, by using digital data and cross-checking between enforcement agencies operating in different areas to identify potential labour abuses and support workplace inspections.

Further reading on the EFFAT proposal can be found [here](#).



Conclusions

Throughout the last four years our focus on the meat industry allowed us to clearly demonstrate that good industrial relations and bold collective agreements mean improved employment conditions, higher wages, better health and safety standards and more direct employment.

The restless trade union actions have brought a lot of improvements, as shown above, for the workforce in the meat sector in the different countries.

Therefore the economic outlook of further concentration, restructuring and acquisitions in the sector can only mean for trade unions to take the issues on and accompany the workers in these situations.

On European level EFFAT needs to ensure that the new European Parliament and the new European Commission take up our EFFAT demand for a Directive on labour intermediaries and fair working conditions across subcontracting chains⁴. EFFAT with its affiliates will actively push the issue on the European agenda.

Another path to exploit are the reporting and due diligence obligations of companies under the EU legislation.

Furthermore should the leverage of the Minimum Wage Directive be used by the trade unions on national level to ensure collective bargaining coverage as well in the meat sector.

It will be essential to look into the meat production as well from the perspective of sustainability and just transition. What impact will the green transition measures have in the meat sector and on its workforce and how can those adaptations been accompanied by social measures?

The sector challenges of labour shortages and high turnover leads to attraction of an ever growing migrant workforce, with all its specific vulnerabilities. It would be beneficial to better understand from which country the workers come, to where they migrate, using which intermediaries and staying how long. But as well to get a better understanding of the bilateral agreements existing between different countries on the matter of a migrant workforce.

Trade unions should further exchange on their organising practices specifically concerning the migrant workforce, to learn from one another how to cope with languages, new membership and multiple viewpoints on trade union work.

Accompanying the work in the meat sector means as well to be active on EU level concerning the legislative procedure on animal transport and to actively advocate the EFFAT position.

EFFAT is planning to hold a yearly meat meeting with its affiliates on the meat sector in order to keep all our attention on a workforce which needs trade union action.

The trade unions in Europe together with EFFAT will ensure that Europe MeatTheStandards!

⁴ See: [EFBWW, EFFAT and ETF join forces to Combat Labour Exploitation in Subcontracting Chains and Labour intermediation](#) | EFFAT - European Federation of Food, Agriculture and Tourism Trade Unions



