COCOANET.EU QUESTIONNAIRE 2010-11

ON THE SOCIAL CONDITIONS OF THE EU COCOA INDUSTRY

First results of the survey





Filled Questionnaires received from 10 countries

1. SWITZERLAND
2. GERMANY
3. DENMARK
4. LITHUANIA
5. BELGIUM
6. FINLAND
7. AUSTRIA
8. FRANCE
9. ITALY
10. HOLLAND

Missing:

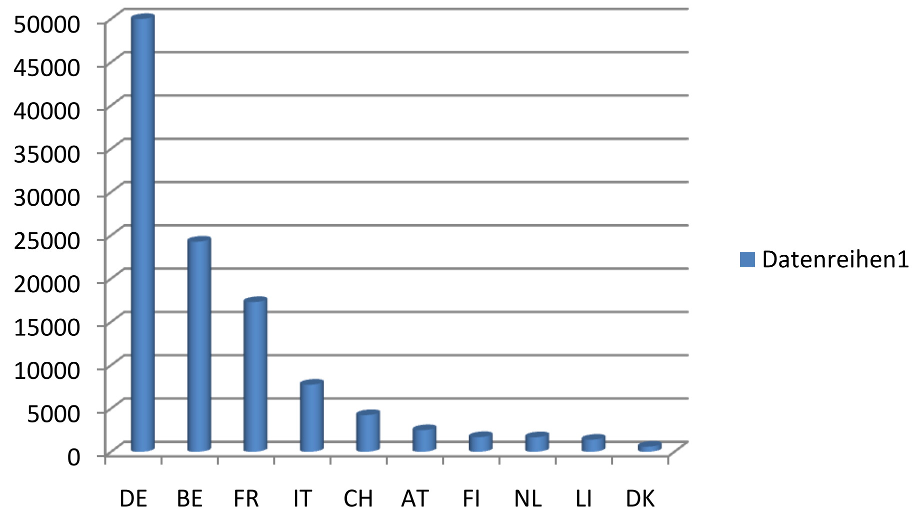
1. UK
2. POLAND
3. MALTA
4. SPAIN

- **Substantial industrial processing sector, especially for Germany, Belgium France &Italy & Switzerland** – (some inconsistencies in totals - to be revised with respondents)

1. **Employment in the EU cocoa/chocolate manufacturing**

	AUSTRIA	GERMANY	DENMARK	BELGIUM	FINLAND	LITHUANIA	SWITZERLAND	ITALY	FRANCE	HOLLAND	TOTAL
Directly employed	2000	30000	598	8284			4241				
Indirectly employed	500	20000		16000							
Chocolate industry	2000	49000	598			1400			10000	1680	
Cocoa processing	0	1000	0			0			1300		
Shipment/transport/packaging	500		0						6000		
Total	**2500**	**50000**	**598**	**24284**	**1700**	**1400**	**4241**	**7755**	**17300**	**1680**	**111458**

DE	**50000**
BE	**24284**
FR	**17300**
IT	**7755**
CH	**4241**
AT	**2500**
FI	**1700**
NL	**1680**
LI	**1400**
DK	**598**



This project is financially supported by the European Commission.

- **Relatively gender balanced industry** – is there a paste vs. processing difference? Other gender difference?

2010	AUSTRIA	GERMANY	DENMARK	BELGIUM	FINLAND	LITHUANIA	SWITZERLAND	ITALY	FRANCE	HOLLAND
Gender breakdown										
Men	900	25000	200	4015		560	2425		10100	1221
Women	900	25000	398	4269		840	1916		7200	459
Total	1800	50000	598	8284		1400	4241		17300	1680

- **Trends in employment** – different trends, rising demand, automatization, precarious work?

2010	AUSTRIA	GERMANY	DENMARK	BELGIUM	FINLAND	LITHUANIA	SWITZERLAND	ITALY	FRANCE	HOLLAND
Chocolate industry		decreasing		increasing	decreased	decreased		stable	decreased by 12%	
Cocoa processing industry		increasing						stable	decreased by 12%	
Ancillary industries		increasing (prec.)				increased		stable	decreased by 12%	

- **Solid core of permanent workers – precarious work not a structural feature of the sector** – true? Comments – caveat: increasing – pre-emptive action needed

4. Forms of employment

	AUSTRIA	GERMANY		DENMARK	BELGIUM	FINLAND	LITHUANIA	SWITZERLAND	ITALY	FRANCE	HOLLAND
	manufact	manufact	grinding	manufact	manufact and grinding	manufact	manufact	manufact and grinding	manufact and grinding	manufact and grinding	manufact and grinding
Permanent workers	75%	71%	90%	90%	83%		80-90%	80%	n/a	66%	70%
Precarious workers	22%	9%	10%	0	17%		14%	5%	n/a	15%	25%
Seasonal workers	3%	20%		10%			6% peak season	15%	n/a	19%	5%
trend in precarious work in cocoa	increasing	increasing	unchanged	unchanged	unchanged	decreasing	increasing	unchanged	n/a	increasing	increasing

- **Company breakdown – key MNEs are KRAFT, BARRY CALLEBAUT, CARGILL, LINDT, NESTLE, MARS, FERRERO** - would be key to complete the employment & conditions picture for these companies to engage with them
- **BELGIUM, SWITZERLAND and DENMARK** still fragmented in deli/craft chocolate makers
- **FRANCE:** larger MNE presence

EFFAT

2. Cocoa and chocolate companies: employment distribution and rough mapping

large multinationals

Companies	AUSTRIA	GERMANY	DENMARK	BELGIUM	FINLAND	LITHUANIA	SWITZERLAND	ITALY	FRANCE	HOLLAND	TOTAL 7 MNEs
Kraft Foods	**300**			**chocolate 420**		chocolate 559	n/a		830		**1279**
Naujoji Ruta						chocolate 250					
UAB Roshen						chocolate 65					
Panda					chocolate 43						
Fazer Makeiset					chocolate 255						
Bouchard				chocolate 65							
Galler chocolatier sa				chocolate 95							
Barry Callebaut		1900		paste 860			7525		paste + choco 1000		**11285**
				chocolate 132							
Kathy Chocolaterie NV				chocolate 61							
Natrajacali NV				chocolate 106							
Baronie Chocolat				chocolate 100							
Italo Suisse				chocolate 109 + 141 seasonal							
NATRA (All Crump NV)				chocolate 123							
Caluwe Demande Pralines NV											
Chocolaterie Ickx NV				chocolate 90							
CARGILL (OCG Cacao)				chocolate 120					paste 120		240
				paste 111							
Godiva				chocolate 306							
Leonidas				chocolate 396							
Guylian											
Belcolade				chocolate 197							
Daskalides											
Neuhaus				chocolate 220							
Chocolat Alprose SA							100				
Chocolats Camille Bloch							180				
CSCC							n/a				
Favarger							125				
Max Felchin							n/a				
Gysi							n/a				
Lindt & Sprungli	250						6652		1600		**8502**
Maestrani							n/a				
NESTLE		770					2581	1173	350		**4874**
Chocolat Stella							n/a				
Chocolat Bernrain							94				
Toms Gruppen			chocolate 416								
Carletti A/S			chocolate 85								
Elvirasminde A/S (Samba)			chocolate 37								
Odense Marcipan (ORKLA)			chocolate 60								
Manner	750										
MARS	200	600							400	1139	**2339**
Loacker	150										
Salzburg Schokoladen	200										
FERRERO		5000						6377	540		**11917**
Storck		4000									
Ritter		800						85			
Dolphin srl								120			
Nutkao											
CEMOI - Jacquot									1700		
Bongrain									1250		
Chocolaterie Sehaal									160		
Petra Food (Nord Cacao)									paste 45		
Baronie										141	
various SMEs		36000		**paste 971**						400	TOTAL MNEs 40436

Conclusions:

- Sector overall in good conditions ref. precarious work
- Employment in a decreasing trend - Precarious work increasing
- Some key MNEs but still fragmented – taste for deli, independent chocolate makers

Discussion:

- Why does this sector show a stronger core of permanent jobs? What lessons can be learnt for other sectors?
- How to prevent an increase in precarious work? What best practices to use?
- How to reach out to SME employees?
- What other areas to focus? Qualitative input?
- National industry reports available?
- Other….