

Collective agreement coverage and the labour market organisations 2025



SWEDISH NATIONAL
MEDIATION OFFICE

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This is a translation of the introduction and summary of the report
"Kollektivavtalstäckning och arbetsmarknadens organisationer 2025"

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1 Introduction

Collective agreements are the cornerstone of the Swedish labour market model. These agreements set out the wages and working conditions negotiated between the social partners (trade unions and employers' organisations) for the coming agreement period. Through the negotiated provisions in the agreements, the social partners in the Swedish labour market can regulate conditions that in many other countries are regulated through legislation. In Sweden, a significant proportion of labour law is dispositive in favour of collective agreements, and the ambition is for the government to stay out of matters relating to collective agreements and their application to the greatest extent possible. The model also enables the social partners to find industry-specific solutions to various issues in different areas of the agreement without this affecting other areas.

A prerequisite for the model to work is that as much of the labour market as possible is covered by collective agreements, which is why collective agreement coverage is a key measure in this context. This report therefore presents statistics on collective agreement coverage in Sweden – both how high it is at an aggregate level and broken down into groups such as industries, occupational groups, etc. As all public sector employees in Sweden are covered by collective agreements, the report largely focuses on the coverage rate in the private sector. A company usually becomes bound by a collective agreement through membership in an employers' organisation, but companies that are not members of an employers' organisation can sign a substitute agreement with the relevant trade union. Through this, the company is bound to the collective agreement in the same way as if they were a member of that employers' organisation. The report includes statistics on the number of substitute agreements signed by various trade unions in 2024.

The legitimacy of the model is also based on the social partners, i.e. those who sign the agreements, representing as many employees and employers as possible. The unionisation rate should therefore be high for both employers and employees. The report contains a chapter on the unionisation rate among employees, focusing on differences in the union membership rate of employees in blue-collar versus white-collar occupations and of employees born in Sweden versus those born abroad.

There are just over 100 central parties on the Swedish labour market. Of these, employers' organisations and trade unions each account for about half. The report shows which organisations exist in the parties of the model, how many members and employees the various organisations have, which collective bargaining cartels exist, and which trade unions are included in the various central organisations and which are outside of these.

2 Summary

In 2025, 88 percent of all employees aged 18–68 were covered by a collective agreement. This proportion is unchanged compared to 2024, and measurements show that the collective agreement coverage rate has remained stable around this level in recent decades.

As all public sector employees are covered by a collective agreement, those not covered work exclusively in the private sector. In this sector, 83 percent of the employees were covered by a collective agreement in 2025. In total, approximately 545,000 employees were not covered by any collective agreement in 2025. Of these, around 205,000 were women and 345,000 were men.

Collective agreement coverage is highest in public administration, but it is also high in other industries in which a very large proportion of the employees work in the public sector. The coverage rate was just shy of 100 percent in the sectors “Education” and “Human health and social work activities”. Manufacturing also had a high coverage rate in 2025, with 96 percent of employees covered by a collective agreement.

In large companies, almost all employees are covered by collective bargaining agreements. Coverage rates then decline as company size decreases. In companies with fewer than ten employees, 44 percent of employees are covered by collective bargaining agreements. Approximately half of the roughly 545,000 employees who are not covered by collective bargaining agreements work in companies with fewer than ten employees.

Employees in blue-collar occupations are covered by a collective agreement to a greater extent than those in white-collar occupations. Approximately 90 percent of blue-collar workers and 76 percent of white-collar workers in the private sector were covered by a collective agreement in 2025.

Employees in blue-collar occupations are thus covered by collective agreement to a greater extent than those in white-collar occupations, but at the same time have a lower rate of union membership than white-collar workers. The union membership rate of blue-collar workers amounted to 54 percent and to 73 percent among white-collar workers in 2025. In total, 66 percent of employees in the 15–74 age group were affiliated with a trade union in 2025.

SUMMARY

Trade union density is highest among employees in manufacturing, education, and health and social care. The lowest levels are found among employees in the hotel and restaurant sector.

Unemployed individuals are union members to a significantly lesser extent than employees. Last year, 29 percent of unemployed individuals were members of a trade union, compared with 66 percent among employees. This difference is largely attributable to unemployed individuals under the age of 25, who have comparatively low rates of trade union membership.

Within the Confederation of Swedish Enterprise, both the number of member companies and the total number of employees working in those companies declined slightly in 2025.

During 2025, the number of economically active members affiliated with LO, the Swedish Trade Union Confederation, decreased by 0.6 percent. At the same time, membership increased by 1.2 percent in both TCO, the Swedish Confederation of Professional Employees and Saco, the Swedish Confederation of Professional Associations.



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