



INTRODUCTION TO BELGIAN FOOD AND DRINK SECTOR

Belgium 2019

1. General Insights – Doing Business in Belgium

Belgium and the United Kingdom have an important and longstanding relationship. Currently, Belgium is the UK's seventh largest export and seventh largest import market (2019). Often referred to as the crossroads of Europe it consists of two very distinct cultural regions, Flanders (Dutch-speaking north; population 6.6 million) and Wallonia (French-speaking south; population 3.6 million). Brussels is officially bilingual (population 1.2 million). There is also a small German-speaking community (77,000) in the southeast.

Belgium has a developed, modern, private-enterprise economy. According to the Belgian foreign trade agency, exports amount to over 80% of the Belgian GDP. Main imports into Belgium are raw materials, machinery and equipment, chemicals, raw diamonds, pharmaceuticals, foodstuffs, transportation equipment and oil products. Main exports out of Belgium are machinery and equipment, chemicals, finished diamonds, metals and metal products and foodstuffs.

Belgium is a small, affluent and multicultural country. Businesses are open to offers from the UK and perceive UK products as innovative and of great quality. Belgium presents opportunities in most sectors, but as it is an open economy based on imports and exports, UK companies can expect competition.

Why consider trading with Belgium:

- Strong and long-standing trade relationship with the UK
- Proximity and easy transport links to the UK
- Excellent transport network, including road, rail and waterways (ports)
- Travel to Amsterdam, Paris, Cologne and Luxembourg in under 2 hours
- Population of 11.4 million with high disposable income
- Average net income per Belgian of €2,000 per month, GDP per capita of €42,000
- English is widely spoken in Belgium
- Barriers to market entry are low

Tips to succeed in Belgium:

- Have a clear Unique Selling Proposition (USP)
- Expect - and prepare for - competition
- Set SMART objectives (Specific, Measurable, Achievable, Relevant, Time-bound)
- Come prepared, have all your facts on delivery time, price, shelf life if appropriate
- Support your distributor with brochures and marketing material
- Be prepared to offer exclusivity to distributors if requested
- Keep in regular touch with your client



2. Particular insights – Food and Drink in Belgium

Often quoted as having the best cuisine in Europe, Belgium's food and drink interests extend far beyond just waffles, beer and chocolate. Despite being a small country, it has rich local resources and a classic French approach for using butter, cream, beer and wine regularly while cooking. Next to that, interest in vegetarian, vegan, gluten-free sugar-free options next to international cuisine is well established.

Consumers decide what is on the menu, having an increased interest in sustainability, health, food safety and the origin of food products. It is up to the food industry to evolve based on what the consumer expects. The Belgian market is usually not characterized by "early adopters", but due to globalisation and the popularity of social media, Belgians are becoming more and more quick to adopt new trends, and thus there is opportunity for the UK's innovative food and drink industry.

While global retail trends indicate that the future of retail is in e-commerce, physical outlets as points of sale for food and drinks remain very important; 90% of Belgian population prefers buying their food and drinks in supermarkets, neighbourhood shops, markets, etc. According to Statista, 13.4% of the average annual income per family is spent on food and drinks, which represents an annual market worth of €22 billion in total per year.

A. Food and Drink Opportunities in Belgium

- Convenience foods
- Spirits
- Snacking on-the-go
- Ethnic foods
- Healthy foods
- Free-from and/or Allergen free
- Organic foods
- Eco-friendly packaging, zero-waste
- Flexitarian diets such as healthy foods and plant-based products.

Alcohol in Belgium

Research in 2018 showed alcohol consumption per capita (APC) in Belgium was 12.6 litres of pure alcohol per capita, compared to 10.1 litres in the United Kingdom. Broken down for Belgium, this number translates to 45% of beer consumption, 38% wine, 14% spirits and 3% of other source of alcohol. None withstanding, interest in the alcohol-free trend is also growing in Belgium.

For the market of spirits specifically, reports state that in Belgium interest for (British) gin remains high, although there are quite a few UK established players already present on the market. Regardless, it is clear that for a British gin company to succeed there needs to be an emphasis on quality, packaging and a feel of "premium". More recently, Belgian demand for flavoured British gins rose steadily.



B. Belgian Landscape

An average Belgian family spends around €5,800 a year on food purchases. We do see clear geographical differences within national borders. For example, in Flanders (€5,900 a year) people spend on average more than in Wallonia (€5,800 euros a year) and Brussels (€5,650 euros a year).

Major supermarkets in Belgium

Three major players dominate this highly competitive landscape with around 3.500 major supermarkets. [Colruyt](#), [Delhaize](#) and [Carrefour](#). Colruyt is the market leader with 30% market share, followed by Ahold Delhaize with 25%, closely followed by Carrefour with 18.7%. The discounters [Lidl](#) and [Aldi](#) hold 5% and 9% respectively, and are quickly growing in market share. Albert Heijn and Delhaize Le Lion merged in 2016. Dutch supermarket [Jumbo](#) has also recently entered the market, and they are expected to put pressure on the aforementioned market leaders.



Mid-sized supermarkets such as [Okay](#) & [Spar](#) (both part of the [Colruyt Group](#)), and [Proxy Delhaize](#) have been on a continued increase market share in the last decade, pushing total numbers of approximately 7.000 mid-sized supermarkets. Success lays in their proximity to urban areas and flexible opening hours to cater successfully to the needs of their clients.





C. Market Entry

There are several routes of entry into the Belgian food market:

- Importers solely import goods for resale to other companies and take legal possession of goods
- Distributors/importers take legal possession of the goods and pay the exporters. They usually carry stocks and provide after sales service when required.
- Directly to the retailer/grocer

The vast majority of supermarkets buy British food and drink products via specialised importers and distributors, which are particularly interesting for exporters of niche products. This is especially the case for retail-ready consumer-oriented products like sauces, beverages and snack products. Convenience stores operate, in general, on a much smaller scale and therefore often buy smaller quantities through wholesalers.

Invoicing should preferably be in Euro and price quoted either Free On Board or Cost Insurance and Freight (FOB or CIF). The shelf life for dry products should be at least a year, the longer the better.

The use of a pure agent (working on a commission-basis for a number of manufacturers or suppliers) has mostly disappeared in Belgium apart from very specific industries (e.g. printing and construction machinery).

Private label products

When we look at the Belgian Food and Drink market, we detect a steady yearly growth in sales of private label products of 1.2%. The A-brands (national brands) sales grow yearly with 0.6%, while 'house brands' (private label brands) increase sales by 2.3%.

Nonetheless, while private label product sales increase more significantly than the national brands, these traditional brands do keep 64% of the market share within their respective sectors. Major players in the wholesale and supply of the above are [Bidfood](#), [Solucious](#) (part of the Colruyt Group) and [Java](#) (now part of Sligro), as well as other distributors who supply gourmet and trendy food and drink products.



D. HORECA

The total sales value of the Belgian food service industry was estimated at €16.5 billion in 2016. The traditional full service restaurant channel is the largest food service channel in Belgium. It accounts for 36% of the Belgian food service industry, while the quick service restaurants channel accounts for 8% of total revenue generated.

Food chains in Belgium are rather under-represented. Various international players are struggling to enter the Belgian market due to cultural factors like the preference for traditional chips-shops and the importance of traditional gastronomy, and economic factors such as high taxes and labour costs. More recently (2019), UK chain [Pret a Manger](#) expanded to Belgium and opened its first concessions' doors in Gare du Midi, the major train station and Eurostar gateway in the Belgian capital Brussels.

Restaurants and Catering in Belgium

Observing the number of restaurants in Belgium, it correlates with the turnover development of the food industry. In 2008, roughly 30.000 restaurants were registered across Belgium, whereas by 2017 this number increased to 33.000 restaurants. From this total number of restaurants over half are quick service oriented.

As of 2017, the turnover of the restaurant industry in Belgium grew annually and amounted to approximately 8.5 billion euros, which was the highest turnover in the period between 2008 and 2017. Furthermore, similar results were observed with the catering industry. In 2008, the catering industry had a turnover of 5.38 billion euros, whereas by 2017 this increased to a total of 8.49 billion euros.

'Gourmet' fast food players are also becoming a trend in Belgium (gourmet pizza or burger restaurants). Fresh Food boxes have also become successful, such as [Hello Fresh](#) (shipped to Belgium from the Netherlands office), as well as [Simply You Box](#) (the Carrefour equivalent of Hello Fresh).

E. Food and Drink fairs in Belgium (2019-2020)

If you are interested in entering the Belgian market for food and drinks, you could consider visiting or participating at one of the specialised fairs mentioned below. The DIT office can provide you with more information on each of them, or connect you with the organisers. Further assistance in setting up introductory meetings at/during these is possible. (In chronological order following first publication of this report Oct 2019)

- [ChefXpo](#)

October 2019 - organised every two years - Kortrijk Expo

Chef is a B2B event for gastronomy and bistronomy, dedicated for chefs and restaurateurs. After one registration, you can register your colleagues for more free entry tickets. The event is B2B only.



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- [BioXpo VitaSana](#)

October 2019 - organised every two years - Brussels Expo

This event attracts visitors from Belgium, the Netherlands, France and other countries. With more than 250 brands, BioXpo VitaSana is the largest organic, eco, natural, and sustainable trade fair in Belgium.

- [Veggie World](#)

October 2019 - organised every two years - Brussels

Veggie World is a trade fair dedicated for people who follow plant-based lifestyles. This event is both B2B and B2C, and is organised internationally.

- [Megavino \(+MegaSpirits\)](#)

October 2019 - organised every year - Brussels Expo

Megavino is Belgium's leading trade fair for wine featuring over 300 exhibitors from 30 countries presenting innovative products and wine tastings. This event is both B2B and B2C.

- [HORECA Expo](#)

November 2019 – organised every year - Flanders Expo Ghent

The Horeca Expo is an annual international trade fair for the hotel, restaurant, cafe and catering industry. In Ghent, the professionals of the industry come together to see the latest innovations. A comprehensive programme of seminars, lectures and demonstrations accompanies the fair.

- [Namur's International Wine and Gastronomy fair](#)

December 2019 – organised every year - Namur Expo

More than 100 regional winemakers offer more than 500 wines at Namur Expo. This is the opportunity to discover hundreds of passionate winemakers in Belgium. This event is B2B and B2C.

- [Tavola](#)

March 2020 - organised every two years - Kortrijk Expo

Tavola is the largest B2B event for food and drink organised at Kortrijk Expo targeting the community of food retail, speciality outlets and catering organisations. From their first edition in 1982, it has evolved towards the niche market of premium food and drinks. DIT Belgium aims at organising a recurrent UK pavilion at this exhibition. B2B only.

- [Seafood Expo Global GSE](#)

April 2020 - Organised once a year - Heysel Brussels

Seafood Expo features more than 1,900 exhibiting companies from 78 countries. Exhibitors supply all types of fish, seafood, and seafood-related product or service such as processing and packaging equipment, freight forwarders and logistical services, seafood-industry service providers. B2B only. After 28 years at the Brussels Expo in Belgium, the event will host its 29th edition in 2021 at Fira in Barcelona.



- [Intra Food Kortrijk](#)

September 2020 - organised every two years - Kortrijk Expo

Trade fair for raw materials, ingredients, additives, consumables and semi-processed products for the food industry in the Benelux and Northern France. B2B only.

- [Broodway](#)

September 2021- organised every three years - Kortrijk Expo

This triennial event is a great opportunity to network with Belgian bakers, pastry chefs, chocolatiers and ice cream makers in Belgium.

- [Meat Expo](#)

September 2021 - organised every three years - Kortrijk Expo

This trade fair occurs alongside the Broodway event, and focuses on the meat industry in Belgium.

- [BIBAC PLUS](#)

2021 (Date TBA) – organised every two years - Antwerp Expo

Bakkers Vlaanderen and the National Federation of Butchers, Delicatessens and Caterers in Belgium provide a comprehensive overview of the latest food products and services to all Belgian professionals. This event is B2B.

F. Food and Drink Federations in Belgium

Information on specific Belgian associations and federations covering your particular product, can be found on their respective links;

- [Belgian Federation of Industrial Bakeries](#)
- [Belgian Brewers](#)
- [Royal Belgian Association for Biscuits, Chocolate, Pralines and Confectionary](#)
- [Belgian Association of Producers of Bottled Water and Soft drinks](#)
- [Royal Belgian Union of Coffee Roaster](#)
- [Belgian Confederation of Dairy Industries](#)
- [Federation of Belgian Producers of Fats and Oils](#)
- [Belgian Royal Milling Association](#)
- [Food and food ingredients for infants and small children](#)
- [Federation of Food Preparations and Supplements](#)
- [Belgian Association of Producers, Bottlers and Importers of Fruit juices and Fruit](#)



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Drinks

- [Union of the Belgian Fruit and Vegetable Processing Sector](#)
- [Federation of the Belgian Ice Cream Industry](#)
- [Union of Belgian Suppliers for Baking, Cakes, Chocolate and Ice Cream Producers](#)
- [Federation of Belgian Meat](#)
- [Belgian Federation of Meat Products](#)
- [Centre for Organic Agriculture and Food](#)
- [Professional Organisation of the Belgian Potato Trade and Processing Industry](#)
- [Professional Organisation of the Belgian Poultry sector](#)
- [Belgian Association for Ready Meals](#)
- [Belgian Spice Association](#)

G. Further DIT Assistance

As DIT, we offer different services to promote and facilitate this entry towards the Belgian territory at two distinct levels.

As a first contact with our overseas DIT team, we would like to get to know your business and evaluate together if the Belgian market could be an interesting market for you. We would like to find out more on your current export activities, the markets you cover and the different ways your company interacts with local contacts. Following your input, and in continued dialogue, we can provide you with (basic) information on Belgium and the particular sector you target. This can include – but is not limited to – introduction to the specific Belgian market segment, information on relevant Belgian legislation, introductions to relevant sector federations, references to potentially interesting local trade fairs and events, as well as information on potential distributors and already present competitors.

If, based on these first free services, you and your company would like to request additional support and concrete assistance from our offices in organising tailor-made solutions; we can agree to escalate actions to a specific activity at which DIT, in accordance with the Ministry's rules and guidelines, offers additional services (Overseas Market Introduction Service (OMIS)).

This OMIS can include – but is not limited to - providing validated trade contacts (cold calling – targeted introductions), organising meeting schedules with potential local clients, organise and execute events at the local Embassy Residence to introduce goods and/or services or any other service deemed necessary for the penetration of the local market, which then is clearly set out and agreed on.

Exporter-specific OMIS work is agreed upon with an estimation of hours assigned to a specific project, which are charged at £55 per hour VTA excluded.



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