

## CBI MARKET SURVEY

## THE FRESH FRUIT AND VEGETABLES MARKET IN BELGIUM

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**Report summary**

This document presents, among other things, the following highlights for the fresh fruit and vegetables market in Belgium:

- Belgium is an important destination in the EU for fresh fruit from developing countries. There are large imports of bananas, kiwi fruit and pineapples, as well as off-season fruit such as citrus.
- Most imported fruit is re-exported to other EU countries and outside the EU.
- Imports have increased by 36% in value over the last 4 years.
- Imports of vegetables are much smaller than fruit imports and the share of developing countries in imports is smaller as well.
- The domestic market for fruit and vegetables is much smaller than the imports.

The survey provides exporters of fresh fruit and vegetables with sector-specific market information related to gaining access to Belgium. By focusing on a specific country, this document provides additional information, complementary to the more general information and data provided in the CBI market survey *The fresh fruit and vegetables market in the EU*, which covers the EU in general. That survey also contains an overview and explanation of the selected products dealt with, some general remarks on the statistics used, as well as information on other available documents for this sector. It can be downloaded from <http://www.cbi.nl/marketinfo>.

**1. Market description: consumption and production****Consumption**

In 2004, consumption of fresh fruit was 83.6 kg per head with a value of €151. Both volume and value increased compared to 2003. Since 2000, however, volume declined and value increased (Table 1.1)<sup>1</sup>. Consumption of vegetables was 64.1 kg per head with a value of €112. Compared to 2003, volume increased and value decreased. Since 2000, value increased stronger than volume. In 2004, total consumption was 869 thousand tonnes of fruit and 666 thousand tonnes of vegetables. Consumption values were €1.6 billion for fruit and €1.2 billion for vegetables.

**Table 1.1 Per caput consumption of fresh fruit and vegetables in Belgium, 2000-2004, volume in kg per caput, value in euro (€) per caput**

	2000	2001	2002	2003	2004
<b>Volume</b>					
Fruit	86.2	80.5	82.8	81.9	83.6
Vegetables	63.0	61.2	62.2	61.8	64.1
<b>Value</b>					
Fruit	126.9	131.0	142.2	146.8	151.2
Vegetables	98.2	105.8	118.6	117.4	112.2

Source: VLAM 2006.

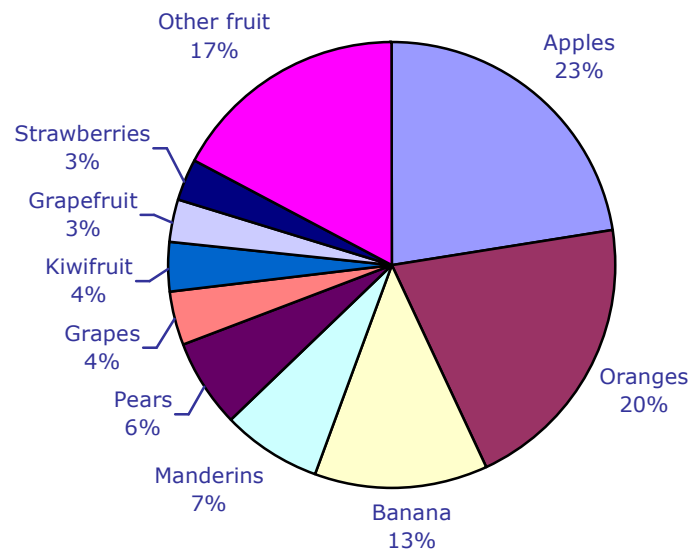
<sup>1</sup> These figures may differ from figures in the CBI market survey Fresh fruit and vegetables in the EU. In the CBI market surveys covering individual countries, national sources are preferred for providing the most detailed information, while the general survey uses statistics that are easily comparable between countries.

## Product groups

### Fruit

Between 2000 and 2004, Belgian fresh fruit consumption decreased by 3% in volume while value increased by 19%. Apples are the most popular fruit with 18.8 kg consumed per head in 2004, which is 23% of total (Figure 1.1). Oranges are second with 17.1 kg (20%), followed by bananas with 10.6 kg (13%). Although apples and oranges are the largest products, their share in total fruit consumption has been declining. The price of apples and oranges in 2004 was €1.37 per kg, which was the same as in 2003. The increase in fruit consumption value therefore came from the other fruit products, in particular the group of other fruit (Figure 1.1).

**Figure 1.1 Volume share of fresh fruit consumption in Belgium in 2004**



Source: VLAM 2006

### Vegetables

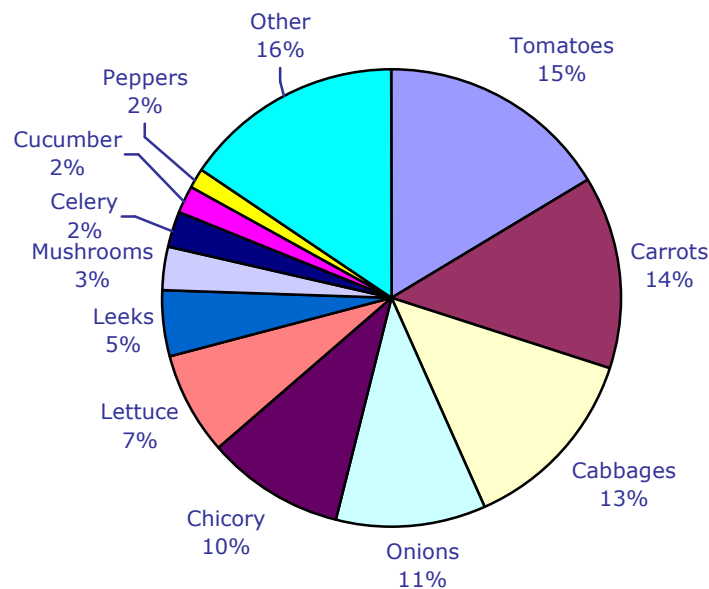
Consumption of vegetables increased by 4% in volume in 2004 but due to lower average prices, value decreased by 4%. Since 2000, the value of vegetables consumed per caput increased more rapidly than the volume consumed (19% compared to 2%).

Tomatoes are the most popular product. They have a share of 15% of total volume of vegetables consumed in 2004 (10.4 kg). This volume share has been stable since 2000. Carrots are second with a volume share of 14%, followed by cabbages, onions and chicory (Figure 1.2). The volume share of most vegetables remained stable but the value has shown significant differences. The value share of tomatoes has decreased from 19% to 16% while the group of other vegetables (among others courgette and eggplant) has increased in value.

### Trends in consumption

Belgian consumers are becoming more concerned about their health. Attention is paid to the problem of obesity and the consumption of fresh fruit and vegetables is promoted as a means to combat the problems of overweight. There is a trend towards more convenience in preparing meals, offering opportunities for pre-cut and pre-packed products. In retailing, there is a trend in one-stop-shopping and increased popularity of discount stores (see also Chapter 3 on retail trends).

Organic fruits and vegetables are becoming more popular. Sales of organic products increased from 149 million Euro in 2000 to 315 million Euro in 2004 (FOD Algemene Statistiek 2006). The growth in the organic market is expected to continue.

**Figure 1.2 Volume share of vegetables consumption in Belgium in 2004**


Source: VLAM 2006.

### Production

#### Total production

Total fruit production was 633 thousand tonnes in 2005, an increase of 31% since 2001 (Table 1.2). Belgium accounted for only 1% of total fruit production in the EU in 2005. The extent of land under fruit production was 17.831 hectare and is dominated by apples and pears. The area dedicated to apples and their production has been decreasing steadily since 1999 (FOD Algemene Statistiek 2006), to recover a bit in 2005 reaching 350 thousand tonnes. The most popular varieties of apples are Jonagold, Jonared, Golden Delicious and Boskoop (ZMP 2006). Pears are the second largest fruit product with 40% of production area. Part of the apple production area has been replanted with pear trees and the area and production of pears have been increasing since 1999. Pear production rose by 260% from 2001 to 2005. Strawberries are the third-largest fruit product produced in Belgium. Most of them are produced in the open field and small part in greenhouses. Greenhouse production accounts for less than 2% of total fruit production.

**Table 1.2 Production of fresh fruit and vegetables in Belgium, per product group, 2002-2004, in 1,000 tonnes**

	2001	2003	2005		2001	2003	2005
<b>Total fruit</b>	<b>474</b>	<b>546</b>	<b>633</b>	<b>Total vegetables</b>	<b>2,287</b>	<b>2,510</b>	<b>2,520</b>
Apples	337	319	350	Chicory roots	600	693	648
Pears	89	176	231	Carrots	172	233	320
Strawberries	41	41	42	Tomatoes	233	250	230
Cherries	3	7	6	Leeks	152	175	180
Currants	2	2	2	Green peas	145	192	170
Other fruit	2	2	2	Cabbages	110	115	110
				Other vegetables	875	852	862

Source: FAOSTAT, 2006

From 2001 to 2005, Belgian vegetables production increased by 10%, reaching 2.5 million tonnes in 2005. Belgium accounted for 3% of total EU vegetables production in 2005. The most important product was chicory roots ("witlof"), a Belgian speciality that is also

appreciated in Germany, France and the Netherlands. Production of carrots has increased by 86% from 2001 to 2005, taking over the second place from tomatoes. Tomatoes, leeks, green peas and cabbages are other important product groups.

According to FOD Algemene Statistiek, the area devoted to vegetables production has been decreasing since 2001, except for a short-lived increase in 2004. Belgian vegetables are produced on 10.816 hectares of which 10% is greenhouse area. Tomatoes are the largest product group in greenhouse production, occupying 46% of the total greenhouse area. Cucumber production area decreased rapidly over the last 5 years by 34% while sweet peppers increased by 16%.

### ***Forecast and trends in production***

Production of fruits of perennial crops such as apples and pears is growing. It is unclear if this trend will continue since not more area is planted with trees. Growth in pears will be at the expense of apples. Belgium produces more vegetables than are needed for domestic consumption and is therefore a net exporter of vegetables. Except for tomatoes, most vegetables are grown in the open field.

### **Opportunities and threats**

Although the Belgian consumption pattern still reflects the preference for traditional and domestically produced products, there is an increase in consumption of exotic fruits. Belgium is an attractive market for exporters from developing countries: not primarily from the point of view of consumption but as an important re-exporter of exotic and off-season products (Chapter 2).

### **Useful sources**

- VLAM, Flemish centre for the promotion of agricultural and fishery products. <http://www.vlam.be>.
- VILT. Flemish Agricultural information centre. <http://www.vilt.be>.

## 2. Trade: imports and exports

### Imports

#### **Total imports**

In 2005, Belgian fresh fruit imports amounted to €2.1 billion and 2.4 million tonnes. Belgium is the fourth-largest fruit importer in the EU, accounting for 12% of EU import value in 2005. From 2001 to 2005, import value of fruits increased by 36% and volume by 12%. 65% of the import value consists of imports from outside the EU. Belgian imports of fresh vegetables were €480 million and 970 thousand tonnes in 2005. Eight percent of these imports originated from countries outside the EU. Compared to 2001, import value of vegetables increased by 24% and volume increased by 10%.

Together with the United Kingdom, Belgium is the largest importer of fruits from developing countries, accounting for 21% of all EU fruit imports from developing countries in 2005. Fruit import value from developing countries in 2005 was €1.4 billion (Table 2.1). From 2001 to 2005, fruit imports from developing countries increased by 56% in value and 17% in volume. Latin American countries are the largest suppliers (of mainly bananas), together with New Zealand (mainly kiwi fruit and apples). Imports of vegetables are considerably lower than fruit. The Netherlands and France are the largest suppliers. From 2001 to 2005, imports of vegetables from developing countries increased by 50% in value and 8% in volume.

**Table 2.1 Imports by Belgium and leading suppliers with their value shares, 2005**

	Leading suppliers 2005	Share	Import value
<b>Fruit</b>			
Intra EU	The Netherlands (7%), France (5%), Italy (3.7%)	25%	528
Extra-EU non-DC*	New Zealand (8%), Israel (1.1%), USA (0.7%)	10%	208
DC*	Colombia (17%), Costa Rica (13%), Ecuador (8%), Argentina (4.9%), South Africa (4.0%), Cameroon (3.8%)	65%	1,368
<b>Vegetables</b>			
Intra EU	The Netherlands (45%), France (19%), Spain (17%)	87%	420
Extra-EU non-DC	Israel (3.7%), New Zealand (0.6%), Australia (0.6%)	5%	24
DC*	Egypt (2.1%), Argentina (1.4%), Ethiopia (1.3%), Kenya (0.9%), Peru (0.7%), Morocco (0.3%)	8%	37

\*DC: Developing countries

Source: Eurostat 2006

#### **Imports by product group**

##### *Fruit*

The products with the largest imports from developing countries, in terms of value in 2005, were bananas, pineapples, grapes, oranges and apples (Table 2.2). Colombia is the largest supplier of bananas, followed by Ecuador and Costa Rica. Pineapple is one of the fastest-growing products. From 2001 to 2005, import value increased by 38% and volume by 86%. Costa Rica is the largest supplier of pineapples to Belgium. Other fruits that experienced growth in import from developing countries are lemons and limes, melons, tangerines and strawberries.

**Table 2.2 Belgian fresh fruit imports and leading suppliers with their market shares, by value in million euro (€), shares in % of value, in brackets import value from developing countries**

Product	2003	2005		Leading suppliers in 2005 (share of total product import value)	Share (%)
Bananas	720 (703)	871 (855)	Intra EU:	The Netherlands (0.7%), France (0.6%), Germany (0.3%)	2%
			Extra EU excl DC*:		0%
			DC*	Colombia (40%), Ecuador (19%), Costa Rica (15%), Cameroon (9%), Panama (5%), Côte d'Ivoire (4.0%)	98%
Pineapples	151 (141)	208 (203)	Intra EU:	The Netherlands (1.2%), Germany (0.3%)	3%
			Extra EU excl DC*:		0%
			DC*	Costa Rica (66%), Ghana (10%), Honduras (9%), Côte d'Ivoire (6%), Brazil (2.3%), Ecuador (2.3%)	97%
Grapes	132 (75)	126 (67)	Intra EU:	Italy (27%), The Netherlands (14%), Spain (2.7%)	46%
			Extra EU excl DC*:	Israel (0.6%)	<1%
			DC*	South Africa (23%), Argentina (16%), Brazil (4.0%), Egypt (4.0%) Namibia (3.9%), Morocco (0.7%)	53%
Oranges	117 (33)	116 (37)	Intra EU:	Spain (45%), The Netherlands (15%), France (2.2%)	67%
			Extra EU excl DC*:	Israel (0.6%), USA (0.4%)	1%
			DC*	Morocco (15%), South Africa (11%), Argentina (4.5%), Uruguay (1.0%), Zimbabwe (0.5%), Egypt (10%)	32%
Apples	193 (46)	139 (37)	Intra EU:	France (17%), The Netherlands (13%), Italy (5%)	38%
			Extra EU excl DC*:	New Zealand (36%)	36%
			DC*	Argentina (15%), South Africa (8%), Brazil (1.6%), Chile (1.1%), China (0.5%)	26%
Lemons and limes	27 (13)	39 (26)	Intra EU:	Spain (19%), The Netherlands (10%), Germany (2.2%)	35%
			Extra EU excl DC*:		0%
			DC*	Argentina (51%), South Africa (5%), Mexico (5%), Uruguay (1.8%), Brazil (1.1%), Turkey (0.8%)	65%

\*DC: Developing countries

Source: Eurostat 2006

### Vegetables

Belgian import accounted for 5% of total EU vegetables import value in 2005. The largest products in terms of value were tomatoes, carrots, beans, onions and shallots, and sweet peppers. The products with the largest imports from developing countries were beans, onions and shallots, asparagus, garlic and peas (Table 2.3). Most important supplier of beans to Belgium is the Netherlands, which is a major importer of beans from developing countries. Also for asparagus, the imports from the Netherlands are mainly re-exports. The fastest-growing products were beans, asparagus, sweet peppers, garlic, peas and tomatoes.

**Table 2.3 Belgian imports of fresh vegetables in 2003 and 2005, leading supplying countries with their value share in 2005, import value in million euro (€), and in brackets import value from developing countries**

Product	2003	2005		Leading suppliers in 2005 (share of total product import value)	Share (%)
Beans	34 (13)	41 (18)	Intra EU:	The Netherlands (36%), France (12%), Spain (3.6%)	55%
			Extra EU excl DC*:		0%
			DC*	Egypt (21%), Ethiopia (15%), Kenya (7%), Senegal (0.9%), Gambia (0.8%), Tanzania (0.3%)	45%
Onions and shallots	49 (9)	41 (5)	Intra EU:	The Netherlands (43%), France (15%), Spain (10%)	75%
			Extra EU excl DC*:	New Zealand (7%), Australia (7%)	13%
			DC*	Argentina (10%), Egypt (1.2%), Chile (0.3%)	12%
Asparagus	9 (0.5)	12 (3.6)	Intra EU:	The Netherlands (49%), Spain (27%), France (3.5%)	70%
			Extra EU excl DC*:		3%
			DC*	Peru (27%), Mexico (1.7%), Thailand (0.4%)	30%
Garlic	7 (1.8)	9 (2.7)	Intra EU:	France (33%), Spain (25%), The Netherlands (9%)	69%
			Extra EU excl DC*:		0%
			DC*	Argentina (30%), Egypt (0.5%), China (0.2%)	31%
Peas	26 (1.3)	20 (1.9)	Intra EU:	France (53%), The Netherlands (28%), Denmark (6%)	90%
			Extra EU excl DC*:		0%
			DC*	Kenya (6%), Egypt (2.9%), Guatemala (0.4%), Peru (0.4%)	10%

\*DC: Developing countries

Source: Eurostat 2006

### Exports

In 2005, fruit exports were €2.1 billion, 17% of total EU fruit exports. From 2001 to 2005, the value of fruit exports increased by 33%. Most (92%) of the fruit exports is destined to other EU countries. Main destinations were Germany (36% of export value in 2005), the Netherlands (19%) and France (14%). Bananas were the largest fruit product in exports (41% of total export value in 2005), followed by pineapples (10%), pears and quinces (9%), kiwi fruit (8%) and apples (8%).

Exports of vegetables were €599 million in 2005, which is 7% of the total EU export value of vegetables. From 2001 to 2005, export value increased by 6% and volume by 9%. Most important products in exports were tomatoes (35% of total export value in 2005), lettuce (11%) and mushrooms (*Agaricus species*) (11%). Most important destinations were Germany accounting for 35% of total export value, France (23%) and the Netherlands (17%).

### Opportunities and threats

Belgium is an important importer of exotics in the EU. Antwerp is a major entry point for bananas, pineapples and off-season citrus fruit and grapes. Most of the imports are exported to adjacent EU countries. The imports and re-exports are increasing. Other exotics are imported in smaller quantities. Belgium also imports vegetables from developing countries, but the quantities are small and there are fewer re-exports.

**Useful sources**

- EU Expanding Exports Helpdesk - <http://export-help.cec.eu.int/>
- Eurostat – official statistical office of the EU - <http://epp.eurostat.cec.eu.int>

**3. Trade structure****Infrastructure**

Belgium serves as an important European transit port for global exports of fresh vegetables and especially fruit. Belgium is located in the heart of Western Europe and borders the North Sea, an attractive location for a seaport. In addition, Belgium has excellent infrastructure. It is connected to Rotterdam and the major rivers Rhine and Meuse by the Rhine-Scheldt canal. Antwerp is the most important Belgian port.

**Trade channels**

The European Centre for Fruit and Vegetables in Brussels is the most important destination of imported fruit and vegetables. The centre consists of more than 30 buyers and sellers and accommodates warehouse facilities, customs authorities and a branch office of the Ministry of Agriculture. Every year, close to a million tonnes of fruit and vegetables are traded at this centre. Products traded here are distributed to wholesale markets and retailers both inside Belgium and internationally.

For a list of importers and wholesalers active at the European Centre for Fruit and Vegetables in Brussels, see <http://www.cefl-ecfg.be>.

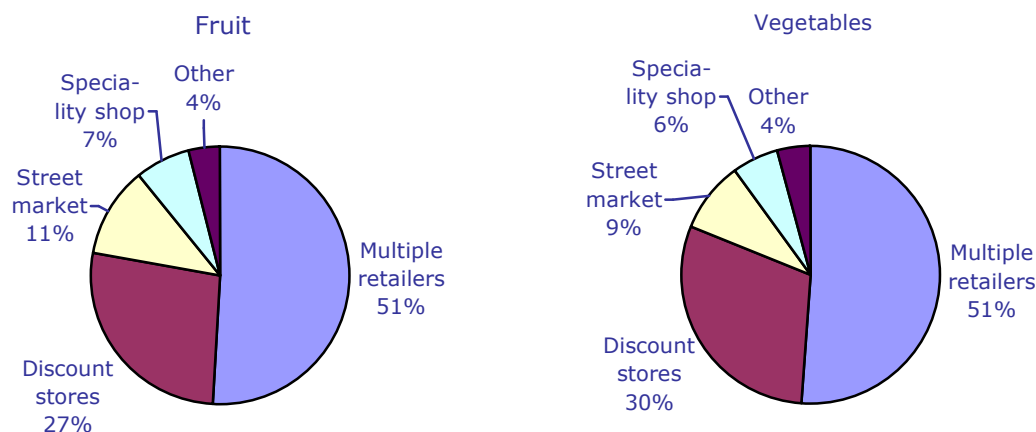
**Retail trade**

Turnover of food retailers in 2004 was €19 billion, which is an increase of almost 4% compared to 2003. This increase was not expected to continue, however, in 2005 (EVD, 2006). The largest retailer is Carrefour (<http://www.carrefourbelgium.be>) with 18% of market share in 2003, followed by the Belgian discounter Colruyt (<http://www.colruyt.be>) with 15%, and Delhaize (<http://www.delhaize.be>), a service retailer, with 13%. The Belgian consumer is becoming more price-conscious, resulting in a growing market share of the discount stores. A distinction can be made between hard discounters such as the German-based Aldi that has an aggressive low-prices strategy (<http://www.aldi.de>) and Lidl (<http://www.lidl.de>) and the Belgian soft discounter Colruyt. The soft discounters have a market share of 18%, the hard discounters have 13% (EVD 2006).

The supermarkets are the most important outlet for fruits and vegetables. Supermarkets account for 77% of all fruit sales and 81% of vegetables sales in volume (Figure 3.1). In 2000, the volume share of supermarket sales was 70% for fruits and 77% for vegetables, which shows how quickly supermarkets are growing at the expense of other outlets. Discount supermarkets such as Aldi and Lidl have increased their share in supermarket sales of fruit and vegetables more than any other type of supermarket. In 2004, 27% of the fruits and 30% of the vegetables were sold through this type of outlet. Figure 5.2 shows the distribution of sales over the different retail outlets in 2004. The multiple retailers include supermarkets and hypermarkets.



**Figure 3.2 Market share of retail outlets in sales of fruit and vegetables based on sales volume, in 2004.**



Source: VLAM 2006.

### Trends

Like in many northwestern European countries, there is a tendency towards one-stop shopping. Multiple retail stores have been capturing a growing proportion of sales from consumers. Belgian consumers are also becoming more price conscious. After the introduction of the Euro, food was perceived as more expensive, and price battles in countries surrounding Belgium make consumers feel that they pay too much for food products. Therefore, discount stores are growing and, as in other European countries, they are strong in the sales of fruit and vegetables.

For more information on trade structure, see CBI market survey 'The fresh fruit and vegetables market in the EU', which can be downloaded from <http://www.cbi.nl/marketinfo>.

### Useful sources

- VLAM, Flemish centre for the promotion of agricultural and fishery products. <http://www.vlam.be>.
- European centre of fruit and vegetables, <http://www.cefl-ecfg.be>.

## 4. Prices and margins

From 2003 to 2005, the average import price of fruit remained stable at €0.86 per kg. The average price of fruit imports from developing countries was €0.85 per kg, an increase of 34% compared to 2003.

The average import price of bananas imported from developing countries increased by 17% to €0.90 per kg in 2005. This is around the average price of EU import of bananas from developing countries. Import prices of oranges and of lemons and limes increased as well (+6%, €0.48 per kg in 2005 and +3%, €0.64 per kg). These price levels are a little above the EU average. The average import price from developing countries decreased for grapes (-10%, to €1.38 per kg) and apples (-7%, to €0.73 per kg).

From 2003 to 2005, the average price of vegetables from developing countries increased by 42%, reaching €1.09 per kg in 2005. Import prices of beans increased by 25%, to reach €1.84 per kg in 2005. Import price of peas increased by 10%, to €3.53 per kg. Products from

developing countries for which the import price decreased were: onions and shallots (-13% to €0.31 per kg); asparagus (-4% to €3.51 per kg); and garlic (-20% to €1.13 per kg).

Importers and agents can give up-to-date information on the price levels of individual products.

#### **Useful sources**

- European centre of fruit and vegetables, <http://www.cefl-ecfg.be>.

## **5. Market access requirements**

As a manufacturer in a developing country preparing to access Belgium, you should be aware of the market access requirements of your trading partners and the Belgian government. Requirements are defined through legislation and through labels, codes and management systems. These requirements are based on environmental, consumer health and safety and social concerns.

#### **Legislative requirements**

National legislation in EU countries is compulsory for all products traded within the country concerned. Therefore, as an exporter in a developing country you have to comply with the legislative requirements that are applicable to your products. For information on legislation for fresh fruit and vegetables go to the CBI website at <http://www.cbi.nl/marketinfo>, select your market sector and the EU country of your interest in the category search, click on the search button and click on legislative requirements for an overview of all documents on legislation in your country of interest.

#### **Non-legislative requirements**

Social, environmental and quality related market requirements are of growing importance in international trade and are often defined by European buyers through labels, codes of conduct and management systems. For information on non-legislative requirements applicable to fresh fruit and vegetables, go to the CBI website at <http://www.cbi.nl/marketinfo>, select your market sector and the EU country of your interest in the category search, click on the search button and click on your subject of interest under non-legislative requirements for an overview of all documents on the subject concerned in your country of interest.

#### **Packaging, marking and labelling**

Requirements for packaging and labelling are subject to the EU marketing standards of fresh fruit and vegetables. You can download information on these requirements from the CBI website. Go to <http://www.cbi.nl/marketinfo>, choose the sector "fresh fruit and vegetables" and choose "market access requirements".

#### **Tariffs and quota**

Access for fruit and vegetables to the European market is regulated through EU Regulation EC 2200/96, on the common organization of the market in fruit and vegetables. This regulation states, among other things, the arrangements regarding trade with third countries. For many fresh fruits and vegetables an import duty has to be paid. For some product, also an entry price or tariff quota may be applied. Countries that are part of the Generalised System of Preferences (GSP) of the EU can make use of the preferential duty rates which are substantially lower than the normal rates. More information on the GSP system can be found at the EU Export Helpdesk for Developing Countries, <http://export-help.cec.eu.int>.

For fresh fruit and vegetables, the reduced value-added-tax rate of 6% is applicable.

## 6. Business practices

### Selecting a suitable trading partner

For information on selection of suitable trading partners, please consult the CBI Market Survey Fresh Fruit and Vegetables 2006, at <http://www.cbi.nl/marketinfo>.

When doing business with Belgian trading partners, you should know in which language to address them. About 60% of the Belgians speak Dutch and nearly 40% French. The language most spoken in Brussels is French. In Antwerp, the main port, Dutch is the language most spoken. English is spoken as well by most Belgians. The business environment is formal. Business talks are primarily meant to build trust and not directly to come to an agreement or contract. Belgians are not as direct as for example the neighbouring Dutch.

For general information, go to CBI's publication 'Export Planner', at <http://www.cbi.nl/marketinfo>.

### Coming to terms with your trade partner

For information regarding different payment methods and delivery terms, please refer to CBI's Export Planner, and CBI's market survey covering the market of fresh fruit and vegetables in the EU. Both documents can be downloaded from the CBI website at <http://www.cbi.nl/marketinfo>.

### Sales promotion

For more information on sales promotion, go to CBI's publication 'Export Planner' and 'Your Image Builder' available at <http://www.cbi.nl/marketinfo>.

## 7. References

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