

CBI MARKET SURVEY

The fresh fruit and vegetables market in Belgium

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Report summary

This CBI market survey discusses the fresh fruit and vegetables market in Belgium. The highlights are summarized below.

- Household consumption decreased in volume, but is growing in value. Citrus fruits, bananas, grapes and pineapples are becoming more popular, together with tomatoes, onions, sweet peppers, aubergines and courgettes.
- Belgium is a mid-sized producer of fresh fruit and vegetables. Production is increasing quickly. The increasing production of vegetables is mainly used to meet domestic and industrial demand, while a large share of fruit production is destined for the export market.
- Belgium is the fifth largest EU importer of fresh fruit and vegetables in the EU. Between 2003 and 2007, imports of fruit increased 5% per year in value and vegetables 7%.
- With 65%, DCs have a high share in Belgian imports of fresh fruit. Belgium is the third largest importer of fruit from DCs in the EU, after the Netherlands and the UK. DCs are still gaining market share: imports from DCs grew at an average of 7% per year in value.
- Belgium is the largest EU importer and distributor of bananas and pineapples from DCs. Imports of bananas and exotic fruit from DCs grew more quickly than total imports.
- Total imports as well as imports from DCs of citrus fruit, apples, pears and quinces and grapes decreased between 2003 and 2007. Imports of stonefruit from DCs also decreased.
- Belgium is becoming more important as a re-exporter of bananas and exotic fruit, while it is becoming less important as a re-exporter of citrus fruit and grapes.
- More than three quarters of the fresh vegetables are imported from other EU countries, but DCs are gaining share, with an average annual growth of 21% in value, and 4% in volume.

This survey provides exporters of fresh fruit and vegetables with sector-specific market information related to gaining access to the Dutch market. The survey is complementary to the CBI market survey 'The fresh fruit and vegetables market in the EU', which covers the EU market 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.eu/marketinfo>.

1 Market description: consumption and production**Total consumption**

Apparent consumption¹ of fresh fruit and vegetables in Belgium was 2.6 million tonnes in 2007 (Table 1.1). Belgium is a mid-sized market of fresh fruit and vegetables, accounting for 1% of fruit consumption in the EU, and 3% of vegetable consumption. Belgium is the tenth largest consumer of vegetables, but only fourteenth in the consumption of fruit. In 2007, the Belgians consumed 761 thousand tonnes of fruit, which equals to 72 kg per person, far below the EU average of 94 kg (Table 1.1). Consumption of vegetables amounted to 1.9 million tonnes, an average of 176 kg per person, far above the EU average, which is 120 kg. Industrial demand forms a substantial share of the apparent consumption, but the food industry is mainly supplied by domestic production and therefore hardly presents an outlet for DCs. Industrial demand for fresh fruit and vegetables from DCs is small. Between 2002 and 2007, consumption of fresh fruit decreased 4% (-0.8% per year), while consumption of fresh vegetables increased 8% (+1.6% annually).

¹ Calculation based on data from Eurostat (2007, 2008) and the Food and Agriculture Organisation (2008). Apparent consumption includes industrial and consumer demand, and is calculated as production plus imports minus exports.

Table 1.1 Apparent consumption of fresh fruit and vegetables in Belgium, 2002-2007, in thousand tonnes

	2002	2003	2004	2005	2006	2007
Fruit	792	881	925	669	823	761
Vegetables	1,716	1,962	1,871	1,855	1,836	1,858
Total	2,508	2,843	2,796	2,524	2,659	2,619

Source: FAOSTAT - Food and Agriculture Organization, 2008, and Eurostat, 2007 and 2008

Household consumption

Compared to the average growth of total food consumption (+1.6% in value between 2002 and 2006), household consumption of fresh fruit increased more quickly, while consumption of fresh vegetables remained behind. The average annual GDP growth was 2.3% between 2002 and 2007. Due to the economic crisis, the GDP growth rate is expected to slow down to 0.1% in 2009. Because of the recession, Belgian consumers may become more careful in their spending, and sales of luxury food products are expected to decrease (United States Department of Agriculture, USDA, 2008).

Based on an extrapolation of trends, the Belgian market for fresh fruit and vegetables is not expected to change much in volume, but, depending on the influence of the recession, value may increase. Belgian consumers more often choose higher value fruit and vegetables, and pre-cut and pre-packed fruits and vegetables, which are less in volume than whole products and more expensive, are becoming more popular. Consumers of pre-cut and pre-packed fruit and vegetables are generally more affluent and less affected by the crisis.

Table 1.2 Household consumption² on fresh fruit and vegetables in Belgium, 2002-2007, in thousand tonnes and in million euros

	2002	2003	2004	2005	2006	2007	AAC
Fresh fruit							
Volume	869	n.a.	878	848	811	824	-1%
Value	1,493	n.a.	1,588	1,536	1,600	1,635	1.8%
Fresh vegetables							
Volume	653	n.a.	673	649	582	585	-2%
Value	1,245	n.a.	1,178	1,218	1,287	1,295	0.8%

Source: Flemish Centre for Marketing of Agricultural and Fishery Products, VLAM, 2008

Fresh fruit

In 2007, household consumption of fresh fruit was 824 thousand tonnes (79 kg per person), with a value of €1,635 million (€157 per person) (Table 1.2). The majority of Belgians, 64%, do not eat fruit every day. The most popular fruit species consumed in Belgium are apples (17 kg per person in 2007), oranges (15 kg) and bananas (12 kg), together accounting for 55% of consumption per capita. Mandarins ranked 4th in consumption (7 kg), and pears were 5th with a consumption of 5 kg per person. Other important fruits are grapes, kiwi fruit, stone fruits (peaches, nectarines, apricots and plums), strawberries, grapefruits and pineapples.

Between 2002 and 2007, consumption decreased 5% in volume, while sales value increased 10% (Table 1.2). This is partly due to increasing prices, but also because of a shift towards buying higher value fruits, such as grapes and strawberries. Consumption of apples decreased in volume, and because of a stable price, sales value also decreased between 2006 and 2007 (Table 1.3). Consumption volume of citrus fruits increased since 2005. Oranges and mandarins are well-liked. Bananas, grapes and pineapples are becoming more popular. Market shares of bananas and grapes increased steadily since 2004, in value and in volume. The banana market increased 5% in volume between 2005 and 2006, and again 4.5% between 2006 and 2007.

² Excluding out-of-home consumption

After three years of expansion, the market for stone fruits decreased in 2007 (Table 1.3). The per capita consumption volume of pears increased slightly, but because the average price decreased, sales value decreased in 2007, with more than 6%. After a bad season in 2006, strawberries had a good year in 2007. The price remained stable, at €4.3 per kg, and both consumption volume and value increased more than 7%.

Table 1.3 Household consumption of fresh fruit in Belgium, 2004-2007, total volume (thousand tonnes) and value (million euros) and shares

Fresh fruit	Volume (% of volume)				Value (% of spending)			
	2004	2005	2006	2007	2004	2005	2006	2007
Total	878	848	811	824	1,588	1,536	1,600	1,635
Citrus fruits	33.0	30.8	31.3	32.2	26.5	26.1	24.9	26.1
Other fruit	12.2	11.7	10.6	11.0	18.7	18.5	19.8	19.8
Apples	22.5	22.8	22.7	21.2	17.0	15.4	15.8	15.1
Bananas	12.7	12.8	14.1	14.7	10.6	11.8	11.0	11.1
Stone fruits	6.6	7.7	8.1	7.2	9.6	10.1	11.2	9.9
Grapes	3.8	4.5	4.3	4.5	6.0	6.9	6.8	7.5
Strawberries	2.8	2.8	2.5	2.6	6.4	6.2	5.4	5.7
Pears	6.5	6.9	6.5	6.6	5.2	5.1	5.1	4.7

Source: VLAM, 2008

Fresh vegetables

Household consumption of vegetables amounted to 585 thousand tonnes in 2007 (56 kg per person), with a value of €1,295 (€125 per person) (Table 1.2). On an average day 66% of the Belgians eat vegetables, while 34% do not. Still, vegetables are an important part of the daily menu (InSites and VLAM, 2008). Over 60% of sold fresh vegetables are in the top ten (Table 1.5). Domestically grown vegetables such as tomatoes, lettuce and the national favourite vegetable chicory are the most popular products (Table 1.4). With a consumption of 10 kg per person in 2007, tomatoes are the most popular product. Within this category, vine tomatoes have a 36% market share in value. Roma tomatoes and cherry tomatoes also showed growing market shares, at the expense of 'standard' tomatoes. Tomatoes are followed by carrots (9 kg per person in 2007), onions (7 kg), chicory (6 kg) and lettuce (3 kg) (Table 1.4).

Table 1.4 Household consumption of fresh vegetables in Belgium, 2004-2007, total volume (thousand tonnes) and value (million euros) and shares

Fresh fruit	Volume (% of volume)				Value (% of spending)			
	2004	2005	2006	2007	2004	2005	2006	2007
Total vegetables	878	848	811	824	1,178	1,218	1,287	1,295
Other vegetables	20.4	21.0	21.3	21.8	34.5	33.5	32.7	33.1
Tomatoes	16.3	16.1	17.5	17.5	16.2	17.4	16.3	16.8
Lettuce	7.0	6.6	6.2	6.0	12.2	12.7	13.0	12.5
Chicory	9.7	10.5	11.3	11.3	10.1	10.3	10.7	10.4
Cabbages	13.3	11.0	8.3	8.6	9.1	8.4	8.6	8.6
Carrots	13.6	14.4	15.6	15.3	5.4	5.7	6.2	5.9
Onions	10.8	11.5	11.8	11.6	4.0	3.6	4.1	4.6
Leeks	4.8	4.8	4.5	4.7	3.2	3.0	3.5	3.0
Peas and beans	2.1	2.1	2.1	2.4	3.9	3.2	2.9	3.1
Celery	2.0	2.0	1.4	0.8	1.4	2.2	2.0	2.0

Source: VLAM, 2008

With a decrease of 10% in volume (2% annually), purchases of fresh vegetables by Belgian households decreased more quickly than purchases of fresh fruit. Sales value did increase: +4% between 2002 and 2007 (Table 1.2). Between 2004 and 2007, market share decreased for cabbages, including cauliflower and broccoli (Table 1.4). Tomatoes, carrots, onions and chicory gained market share in value and in volume.

Sales of miscellaneous vegetables decreased in volume, but increased in value between 2004 and 2007. Market shares of sweet peppers, aubergines and courgettes in this category, were also growing.

Market segmentation

In addition to the general segments described in the CBI market survey 'The fresh fruit and vegetables market in the EU', the following consumer segments are specifically relevant for the Belgian market. Belgium consists of the Dutch-speaking Flanders and the French-speaking Walloon provinces. The Flemish and Walloon citizens have different consumption patterns. In Flanders, people generally spend more money in bars and restaurants, and out-of-home consumption is much higher than in the capital and in the south. In the northern part of the country there is a much larger offer of establishments, which leads to higher expenditures. Differences are also highly culturally determined. The Walloon people have a more exuberant lifestyle, resembling their southern neighbours, the French.

In Belgium, families with children account for 45% of the population, and for only 40% of the consumption of vegetables. For the lower income families this share in vegetable consumption is decreasing. Younger and older generations have different preferences in fresh fruit and vegetable consumption. While among the older generation pears, citrus fruits, stone fruits, and other minor fruits are popular, young families have a preference for apples and exotic fruits, such as pineapples and kiwifruit. Older people prefer celery, beans and peas, chicory and asparagus, while families and the younger generation like carrots, sweet peppers, cherry tomatoes and new varieties of lettuce.

Trends in consumption

In addition to general consumer trends, such as those relating to health, convenience and pleasure, described in the CBI market survey 'The fresh fruit and vegetables market in the EU', the following trends are specifically relevant for Belgium. Even though the consumption of fresh fruit and vegetables is increasing, and Belgians choose healthy food more often, consumption of fresh fruit and vegetables is still low. According to the Flemish Institute for Health Promotion, Belgians only eat 40% of the recommended daily amount of fruit and vegetables. Together with fruit and vegetables producers and traders, VLAM started a national sensitisation campaign in 2008, to promote consumption of fresh fruit and vegetables.

While the market of organic food is growing more quickly than total food consumption, the organic market in Belgium is still a niche market (USDA, 2008). Household consumption of organic food increased 2% in 2005. Within organic food, organic vegetables are the most important category, having a share of 21%. Organic fruit ranks in fourth position (12%). Most organic products are purchased in supermarkets (60% of total revenues in organic food products) (Flemish Agricultural Information Centre, VILT, 2007).

Production

In 2007, production of fresh fruit amounted to 604 thousand tonnes, and production of fresh vegetables was 1.6 million tonnes (Table 1.5 and 1.6). Belgium is an average size EU producer of both fresh fruit and vegetables. Belgium is the twelfth largest EU producer of fresh fruit, accounting for only 1% of the EU total. With 3% of the total production of fresh vegetables, Belgium is the eleventh producer. In 2005, 8% of total arable land was used for horticulture (49 thousand hectares): production of vegetables (55% of the area), fruit (33%) and flowers (12%). While the land used for horticulture is relatively small, the production accounts for nearly one third of the production value of the Flemish agricultural production (VILT, 2006).

Fresh fruit

Between 2002 and 2007, fruit production has been fluctuating, as a result of changing weather conditions. In 2007, production was 6% higher than in 2002. Apples were by far the largest fruit product, accounting for 55% in total production, but production decreased 5% between 2002 and 2007 (Table 1.5). Part of the area used for apple production, has been replanted with pear trees. Production of pears increased strongly: 27% between 2002 and 2007.

With a share of 36% of the total production in 2007, pears form the second largest fruit product. Popular species are Conference and Doyenné du Comice (Statbel, 2008). Belgium is the fifth largest producer of pears in the EU, accounting for 8% of the production. Strawberries were the third largest fruit in Belgian production, accounting for 7% of the total production volume, and 94% of the production of berries. They are mostly produced in the open field. The remaining 2% of total production consisted of cherries, currants and quinces.

Table 1.5 Production of fresh fruit (excluding grapes) in Belgium, 2002-2007, in thousand tonnes

	2002	2003	2004	2005	2006	2007
Total	570	546	640	589	594	604
Apples	349	319	356	325	325	330
Pears	171	176	231	212	215	218
Strawberries	40	41	44	42	44	45
Cherries	7	7	6	7	7	8
Currants	2	2	2	2	2	2
Quinces	0	0	0	0	1	1

Source: FAOSTAT, 2008

Fresh vegetables

Between 2002 and 2007, production of fresh vegetables increased 9% (+1.7% per year), though there were fluctuations. The most important product is carrots and turnips, accounting for 18% of the vegetable production in 2007 (Table 1.6). Belgium accounts for 18% of the EU production of spinach, and is the second largest producer, after France. Belgium is also a relatively large producer of peas and beans. It accounts for 12% of the production of green beans, being the third largest producer, after Spain and Italy. In the production of green peas Belgium ranks sixth, accounting for 5% of total EU production.

Growth in production was driven by an increasing production of carrots and turnips, cabbages and spinach, which saw increases of 26%, 11% and 32% respectively. Production of tomatoes increased 5% between 2002 and 2007. Production of green beans, cauliflowers and broccoli, dry onions, cucumbers, gherkins and green peppers increased in that period, while production of lettuce and chicory and green peas decreased, by 12% and 27% respectively.

Table 1.6 Production of fresh vegetables in Belgium, 2002-2007, in thousand tonnes

	2002	2003	2004	2005	2006	2007
Total	1,494	1,596	1,698	1,649	1,609	1,631
Vegetables fresh nes	380	415	448	488	400	401
Carrots and turnips	231	242	301	254	280	290
Tomatoes	234	250	246	230	240	245
Cabbages and other brassicas	113	115	107	110	124	125
Beans, green	97	105	109	107	110	105
Spinach	77	77	85	96	100	101
Cauliflowers and broccoli	86	95	86	86	93	94
Lettuce and chicory	85	85	86	76	75	75
Peas, green	74	80	78	58	52	54
Onions, dry	32	41	41	53	42	45
Mushrooms and truffles	43	43	43	43	43	43
Cucumbers and gherkins	26	28	46	23	29	30
Chillies and peppers, green	15	15	17	19	17	18
Eggplants (aubergines)	0	4	4	4	4	4
Asparagus	1	1	1	1	1	1
Maize, green	1	1	1	1	0	0

Source: FAOSTAT, 2008

Part of the domestically produced fruits and vegetables is used in the food industry. Belgium has the largest industry of frozen vegetables in the EU, accounting for almost 22% of the EU production. In 2006, 634 thousand tonnes of fresh vegetables (39% of the total production) were processed. Carrots, spinach, green beans and peas and cauliflower are the most important products. For more information, as well as an overview of the main players in the food processing industry for DC exporters, see the CBI market survey 'The preserved fruit or vegetables market in Belgium', at the website <http://www.cbi.eu/marketinfo>.

Trends in production

In 2006, 21% of the production volume of vegetables came from greenhouses. In greenhouse production, tomatoes are the largest product group, accounting for 66% of the production volume, followed by lettuce (18%), sweet peppers (6%), and cucumber (6%). The production of sweet peppers in greenhouses increased rapidly between 2002 and 2006: + 61%. Production of cucumber and lettuce decreased 22% and 11% respectively (Statbel, 2008).

Growth of organic agriculture stagnated after 2002, due to a number of factors. Farmers had fewer possibilities to market their products and they have a common perception that organic agriculture is harder to realize in terms of technical and business economics issues. The ever-increasing complexity of European legislation also plays a role (VILT, 2007).

Opportunities and threats

- ± Apparent consumption of fresh fruit decreased between 2002 and 2007, while production increased. For domestic consumption, imports became less important.
- ± Consumption of fresh vegetables increased quickly, and because production also increased, Belgium became less reliant on imports for the supply of fresh vegetables.
- + Household consumption of fresh fruit and vegetables decreased in volume, but increased in value. Belgians increasingly choose high-value fruit and vegetables, such as grapes, pineapples, strawberries, and courgettes.
- + Citrus fruits, bananas, grapes and pineapples are becoming more popular. In the category of vegetables, market shares increased for tomatoes, carrots, onions, sweet peppers, aubergines and courgettes.
- ± Compared to other EU countries, household consumption of fresh fruit and vegetables is still low. A national campaign was launched to promote consumption.

Trends and market developments can offer both opportunities and threats to exporters. A given trend can be a threat to some and an opportunity to others. These trends should therefore, always be carefully analysed in relation to specific company circumstances. The exporter's specific situation determines whether a development or trend provides an opportunity or threat. An example of such an analysis is provided in Chapter 7 of the CBI market survey 'The fresh fruit and vegetables market in the EU', available from <http://www.cbi.eu/marketinfo>.

Useful sources

- Flemish Centre for Marketing of Agricultural and Fishery Products, VLAM – <http://www.vlam.be>;
- Flemish Agricultural Information Centre, VILT – <http://www.vilt.be> (in Dutch only, → translate with Babelfish – <http://babelfish.yahoo.com>);
- Agriculture and Fisheries – <http://lv.vlaanderen.be/nlapps/docs/default.asp?id=904>;
- Statbel – <http://www.statbel.fgov.be>. Statistical office of the Belgian government.
- FAOSTAT – <http://faostat.fao.org>. Statistics database of the FAO.
- ACNielsen – <http://www2.acnielsen.com>.

2 Trade channels for market entry

Trade channels

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, which makes it an excellent location for a seaport. Antwerp is the most important Belgian port. In addition, Belgium has excellent water infrastructure. It is connected to Rotterdam and to the major rivers Rhine and Meuse by the Rhine-Scheldt canal.

The most common way of entering the Belgian market for DC exporters is through an agent or importer. Another possibility is direct export to wholesalers. The European Centre for Fruit and Vegetables in Brussels is the most important destination of imported fruit and vegetables. The centre, consisting of over 30 buyers and sellers, 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, please go to <http://www.cefl-ecfg.be>. Click on 'English', proceed to 'Our members'.

Some major traders in Belgium are:

- Univeg – <http://www.univeg.be>;
- Central Fruit – <http://www.centralfruit.com>;
- Special Fruit – <http://www.specialfruit.be>.

Retail trade

Belgium retail trade is more similar to French retail trade than to the Dutch, with large supermarkets and hypermarkets located outside the cities. Total turnover of the food sector was €20.3 billion in 2006, an increase of 4% compared to 2005 (ACNielsen, 2007). More than half of the total turnover is made in the large supermarkets. Discounters had a market share of 35% in food sales in 2006. The largest multiple retailers are:

- Carrefour – <http://www.carrefourbelgium.be>, a luxury supermarket;
- AD Delhaize and Delhaize Proxy – <http://www.delhaize.be>;
- Colruyt – <http://www.colruyt.be>, soft discounter.

Fresh fruit and vegetables are mostly purchased in supermarkets, who had an 81% market share in volume sales of fresh fruit and vegetables in 2007, and who accounted for 79% of sales value. Compared to 2005, market share based on volume increased 2%, while market share based on value remained equal. Greengrocers (specialised retailers) and open air markets have a relatively large share in sales of fresh fruit and vegetables if compared to other sector in food sales. Nevertheless, the growth in sales through supermarkets occurs at the expense of these other outlets. Between 2005 and 2007, greengrocers lost market share in value and in volume. They accounted for 5.2% of sales volume in 2007 (down from 6.5% in 2005) and 6% of sales value (down from 6.7%). Open-air markets had a market share of 8.7% in volume (down from 9.4% in 2005) and 9.4% in value, up from 8.9% (VLAM, 2008).

Within the group of supermarkets, multiple retail chains and independent supermarkets lost market share of sales of fresh fruit and vegetables. Hard discounters such as Aldi (<http://www.aldi.de>) and Lidl (<http://www.lidl.de>) increased their market share more than any other type of supermarket: +5% in volume and +4% in value from 2005 (VLAM, 2008).

Retail trends

Although in number small stores still exceed the large ones, the number of small and medium-sized stores is decreasing. In 2006, large supermarkets accounted for 47% of the retail sales, small supermarkets for 33%, hypermarkets for 14% and other shops for 6%. New outlets are mostly hypermarkets and, to a lesser extent, hard discounters. Some retailers such as Carrefour, Delhaize and Colruyt are expanding their businesses by opening new outlets in the convenience segment, such as GB Express, Shop 'n Go, Okay.

In this way, they can provide consumers with specific products at specific times during the day, for which consumers are willing to pay higher prices. Self-service supermarkets are also gaining popularity and online purchases are increasingly being made (ACNielsen, 2007).

With regard to consumers, there is a tendency towards one-stop shopping. Discount stores are growing because of high food prices and a price-conscious consumer. After the introduction of the Euro, food was perceived as more expensive, and price battles in countries surrounding Belgium, made consumers feel they were paying too much. On the other hand, consumers are choosing more and more luxury food products. The range of products in-between are losing importance. The assortment of organic and fair-trade products within supermarkets is growing. Supermarkets are developing their own range of fair trade products (ACNielsen, 2007).

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

Price structure

Margins vary strongly depending on the type of product, the distribution channel and the continual changes in supply and demand and the resulting price fluctuations. It is impossible to draw up a schedule of actual margins for every product/market combination. Importers and agents can give up-to-date information on the price levels of individual products. A useful source in wholesale prices for a large number of fruit and vegetables is Fresh Plaza – <http://www.freshplaza.com>.

Details about methods and terms of payments can be found in the CBI 'Export planner', which provides more information on making an offer and handling contracts. This document is available at <http://www.cbi.eu/marketinfo>.

Selecting a suitable trading partner

General information on selecting suitable trading partners is available in the CBI market survey 'The fresh fruit and vegetables market in the EU', and the CBI publication 'Export planner'. Both documents are available at <http://www.cbi.eu/marketinfo>.

There are many potential partners for exporters in DCs. They can be found at the websites:

- Europages – <http://www.europages.com>. A useful source for finding contact details and information on the activities of importers. The most interesting contacts at Europages can be found under the category Agriculture & Livestock, subcategory Fruits and Vegetables;
- European Centre of Fruit and Vegetables, CEFL – <http://www.cefl-ecfg.be>.
- ABC Belgium, for international entrepreneurs looking for a Belgian business partner – <http://www.belgiumexports.com>;
- <http://www.foodtrader.com> – B2B marketplace for the food and agriculture industry;
- <http://www.agromarketplace.com> – Marketplace for sellers and buyers of fresh produce;
- <http://www.freshinfo.com> – Marketplace for fresh produce.

3 Trade: imports and exports

Imports of fresh fruit

Belgium accounted for 11% of total EU imports of fresh fruit in 2007, making it the fifth largest importer of fruit. Fresh fruit imports amounted to 2.6 million tonnes with a value of €2.3 billion. Compared to the EU average of 37%, imports from DCs are high: 1.7 million tonnes with a value of €1.5 billion, which is 65% of the total import value (Table 3.1). After the Netherlands and the UK, Belgium is the largest importer of fresh fruits from DCs (19% of all EU imports of fresh fruit from DCs). The major fruit products imported into Belgium are bananas (47% of import value in 2007), pineapples (9%), apples (7%), grapes (5%) and kiwifruit (5%). The major fruits imported from DCs are bananas, pineapples, grapes, apples, mango, melons, oranges, grapefruits and plantains. Costa Rica was the major supplier of fresh fruit (17% of the import value in 2007), followed by Ecuador (12%), Colombia (11%), the Netherlands (9%) and Spain (9%) (Table 3.1).

Between 2003 and 2007, imports of fresh fruit increased 21% in value and 18% in volume (+5% in value annually). Imports increased very quickly and also production of fresh vegetables increased. At the same time, apparent consumption decreased. An increasing amount of fresh fruit is re-exported (see 'Exports'). DCs are gaining market share in Belgian imports of fresh fruit. Between 2003 and 2007, imports of fresh fruit from DCs increased 31% in value (7% annually), and 23% in volume. Imports from EU countries increased 19% in value, while imports from non-DC countries outside the EU decreased. Between 2003 and 2007, imports of bananas and exotic fruit showed above average growth (+49% and +45% in value respectively). Imports of these product groups from DCs grew more quickly than the market. Imports of exotic fruit from DCs increased 48% in value and 106% in volume.

With 26% of the EU import value of **bananas** in 2007, Belgium is the largest importer and distributor of bananas in the EU. The port in Antwerp is equipped with advanced facilities to unload bananas from Reefer ships. Almost all bananas stemmed from DCs, with Colombia, Costa Rica and Ecuador being the main suppliers (Table 3.1). Between 2003 and 2007, imports of bananas increased 50% in value and 31% in volume, while imports of plantains (1% of the total banana imports), decreased.

Belgium is also the largest EU importer of pineapples, accounting for 23% of the EU import value. Pineapples account for 79% of the import value of **exotic fruit**. Imports of pineapples from DCs amounted to 281 thousand tonnes with a value of €197 million, which is 95% of the import value. Costa Rica is the major supplier, accounting for 61% of the import value, followed by Côte d'Ivoire (9%) and Honduras (8%). With an increase of 40% in value (9% annually) and 109% in volume between 2003 and 2007, imports from DCs grew more quickly than the market. Imports of mango, mangosteen and guava accounted for 15% of the imports of exotic fruit (24 thousand tonnes). DCs have a market share of 78% in import value, and their share is growing quickly. Between 2003 and 2007, imports of mango from DCs increased 37% annually in value between 2003 and 2007. Total imports had an average annual change of 34% in value. The share in imports of other EU countries became smaller, and while imports from other countries outside the EU are still small, they showed strongest growth (+38% in value annually). Major suppliers are Côte d'Ivoire (45% of the import value in 2007), followed by Senegal (13%), the Netherlands (9%, re-export), Burkina Faso (5%) and Israel (4%).

Other imported exotic fruits are dates (3% of import value), avocados (3%) and figs (1%). More than 70% of the imports of dates and avocados come from other EU countries. The Netherlands and France are important re-exporters of these products. DCs accounted for 39% of the imports of dates, 23% of the imports of avocados, and 11% of the imports of figs. Between 2003 and 2007, the import value of dates and figs increased, both in total imports and in imports from DCs. Both total imports and imports from DCs of avocados decreased.

With 72%, EU countries account for the majority of imports of **citrus fruit** (Table 3.1). Between 2003 and 2007, imports decreased 2% in value and 15% in volume. Imports from other EU countries increased 16% in value and 2% in volume. Imports from non-DC countries outside the EU (mainly the USA and Israel) increased quickly, while DCs lost share in imports. Imports from DCs decreased 49% in value and 54% in volume. Limes were the only citrus fruit for which imports from DCs increased (+77% in value and +43% in volume). Main suppliers were Mexico (49%), Brazil (18%) and Ecuador (3%).

DCs accounted for only 6% of the import value of **berries and other minor fruit**. The main products are strawberries, cranberries and kiwi fruit. Between 2003 and 2007, imports of these products from DCs increased, but volumes are very low. Belgium imports small amounts of passion fruit, carambola and pitihaya (imports from DCs increased), and tamarinds, cashew apples, jackfruit, lychees and sapodilla plums (imports from DCs decreased). More than two thirds of these products are imported from other EU countries, main suppliers being the Netherlands, France and Germany.

Between 2003 and 2007, imports of **apples, pears and quinces** decreased 20% in value and 8% in volume. Imports of table **grapes** also decreased: -6% in value and -14% in volume. DCs lost share in imports in both product groups. Imports of **stonefruit** from DCs also decreased quickly, while total imports increased 9% in value and 13% in volume. **Melons** were imported mainly from other EU countries, accounting for 64% of the imports (Table 3.1). Between 2003 and 2007, imports increased 18% in value and 7% in volume. With an increase of 64% in value (+13% annually) and 68% in volume, imports from DCs grew much more quickly than the market. Growth was driven by a continuous growth in imports of watermelon from DCs (+27% annually in value). Imports of other melons and papaya from DCs also had positive growth rates between 2003 and 2007, but decreased from 2005.

Table 3.1 Imports by and leading suppliers of fresh fruit to Belgium, 2003-2007, share in % of value

	2003 €mln	2005 €mln	2007 €mln	Leading suppliers in 2007 (share in %)	Share (%)
All fresh fruit	1,903	2,108	2,301		
Intra EU	534	533	634	The Netherlands (9%), Spain (9%), France (5%), Italy (3.1%), Germany (1.1%)	28%
Extra EU ex. DCs	225	207	174	New Zealand (6%), USA (1.1%), Israel (0.6%), Canada (0.1%)	7.5%
DCs	1,144	1,369	1,492	Costa Rica (17%), Ecuador (12%), Colombia (11%), Côte d'Ivoire (4.9%), Panama (3.1%), Argentina (3.1%), Cameroon (2.6%), South Africa (2%), Brazil (1.9%), Honduras (1.2%)	65%
Bananas	732	883	1,089		
Intra EU	17	17	29	The Netherlands (1.5%), France (0.6%), Germany (0.2%), Spain (0.1%), The Czech Republic (0.1%)	2.6%
Extra EU ex. DCs	0	0	0		0%
DCs	714	866	1,060	Colombia (24%), Ecuador (24%), Costa Rica (24%), Côte d'Ivoire (7%), Panama (6%), Cameroon (5%), Dominican R. (2.3%), Peru (1.8%), Brazil (1.3%), Ghana (1%)	97%
Exotic fruit	181	239	262		
Intra EU	19	17	24	The Netherlands (5%), France (1.8%), Italy (0.8%), Spain (0.7%), Germany (0.4%)	9.3%
Extra EU ex. DCs	5	8	5	Israel (1.6%), USA (0.5%)	2.1%
DCs	156	214	232	Costa Rica (48%), Côte d'Ivoire (14%), Honduras (7%), Ghana (4%), Ecuador (3.7%), Brazil (3.5%), Senegal (2%), Cameroon (1.3%), Panama (0.8%), Burkina Faso (0.7%)	87%
Citrus fruit	248	272	243		
Intra EU	152	151	176	Spain (48%), The Netherlands (17%), Germany (2.9%), France (2.1%), Italy (1.2%)	72%
Extra EU ex. DCs	17	23	27	USA (9%), Israel (2.4%), Bahamas (0.1%)	11%
DCs	79	98	40	South Africa (6%), Argentina (5%), Mexico (1.6%), China (1.5%), Uruguay (0.9%), Brazil (0.4%), Egypt (0.4%), Honduras (0.3%), Turkey (0.2%), Morocco (0.1%)	17%
Berries and other minor fruits	208	239	213		
Intra EU	86	103	109	The Netherlands (23%), Spain (11%), France (7%), Italy (6%), Poland (2.7%)	51%
Extra EU ex. DCs	113	122	91	New Zealand (40%), Israel (2%), USA (0.7%)	43%

	2003 €mln	2005 €mln	2007 €mln	Leading suppliers in 2007 (share in %)	Share (%)
DCs	9	14	13	Egypt (2.8%), Chile (1.3%), Colombia (0.7%), Argentina (0.4%), India (0.2%), Serbia (0.1%), South Africa (0.1%), Uruguay (0.1%), Madagascar (0.1%), Malaysia (0.1%)	6.1%
Apples, pears and quinces	248	197	198		
Intra EU	83	74	98	The Netherlands (21%), France (16%), Italy (5%), Germany (2.2%), Spain (2.1%)	49%
Extra EU ex. DCs	85	51	47	New Zealand (24%)	24%
DCs	80	73	53	Argentina (18%), South Africa (3.8%), Chile (3.2%), Brazil (1.4%), China (0.6%), Uruguay (0.3%)	27%
Grapes	132	127	124		
Intra EU	57	59	63	Italy (27%), The Netherlands (16%), Spain (4.1%), Germany (1.9%), France (1.5%)	51%
Extra EU ex. DCs	0	1	0		0%
DCs	76	67	61	Argentina (15%), South Africa (15%), Brazil (7%), Egypt (4.3%), Namibia (2.8%), Chile (2.4%), Peru (0.7%), India (0.6%), Turkey (0.3%), Morocco (0.1%)	49%
Stonefruit	100	93	109		
Intra EU	82	78	96	France (32%), Spain (32%), The Netherlands (10%), Italy (8%), Germany (4.2%)	88%
Extra EU ex. DCs	2	2	3	Canada (1.3%), USA (1%), Israel (0.3%), Australia (0.1%)	2.7%
DCs	16	14	10	South Africa (4.6%), Argentina (3.1%), Chile (0.7%), Egypt (0.3%), Serbia (0.2%), Turkey (0.1%)	9.1%
Melons	53	57	63		
Intra EU	37	34	40	France (25%), Spain (19%), The Netherlands (16%), Germany (1.9%), Greece (0.9%)	64%
Extra EU ex. DCs	3	0	0	Israel (0.3%)	0.3%
DCs	14	23	22	Costa Rica (19%), Brazil (13%), Panama (1.1%), Senegal (0.7%), Honduras (0.7%), Côte d'Ivoire (0.3%), Morocco (0.3%), Ghana (0.3%), Turkey (0.1%)	36%

Source: Eurostat, 2007, 2008

Imports of fresh vegetables

Imports of fresh vegetables are considerably lower than of fresh fruit. Belgium accounted for 5% of total EU imports of fresh vegetables in 2007, making it the fifth largest importer of vegetables. In 2007, imports of fresh vegetables amounted to 952 thousand tonnes with a value of €594 million. Most vegetables are supplied by other EU countries; DCs accounted for 11%, less than the EU average of 13% (Table 3.2). The Netherlands (44% of the import value in 2007), France (17%) and Spain (15%) are the largest suppliers, followed by Israel (4%) and Kenya (3%). The major vegetable products imported by Belgium are tomatoes (16% of total import value in 2007), onions (11%), beans (9%), carrots and turnips (7%), sweet peppers (6%) and mushrooms (5%). Exception for beans, most of these vegetables are imported from EU and other developed countries. Argentina supplies 18% of the onions.

Compared to 2003, imports increased 30% in value (an average 6.8% per year, above the EU average of 5.6%), but decreased 16% in volume. Consumption and production increased in volume, while import and export volume decreased, indicating that Belgium becomes less important as a re-exporter of fresh vegetables. DCs are gaining market share; Belgian imports of fresh vegetables from DCs increased substantially, especially in value.

This means more high-value products, such as beans and asparagus, are imported. Between 2003 and 2007, imports from DCs increased 117% in value (+21% annually) and 16% in volume.

The main vegetable products imported from DCs are beans (43% of the import value from DCs in 2007), onions (22%), asparagus (9%), peas (5%), tomatoes (5%) and garlic (2%). In 2007, imports of beans amounted to 14 thousand tonnes with a value of €28 million. DCs accounted for 51% of the import value. Between 2003 and 2007, imports of beans increased 58% in value and 8% in volume. Imports from DCs grew even more quickly (114% in value and 55% in volume). The Netherlands is the most important supplier of beans (34% of the import value in 2007, mostly re-exports from DCs), followed by Kenya (23%), Egypt (13%), Ethiopia (12%), and France (8%). France is the main supplier of peas (48%), followed by the Netherlands (29%) and Germany (3%). DCs accounted for only 15% of the imports of peas, mainly coming from Kenya (12%) and Egypt (2%). Total imports of peas decreased between 2003 and 2007 (-27% in value), but imports from DCs increased quickly: +116% in value.

Import of onions from DCs increased 62% in value, but decreased 13% in volume. Peru is the second supplier of asparagus to Belgium, after the Netherlands, and had a share of 36% in total import value. Imports from DCs are low, but increased quickly. Other products with growing imports from DCs are tomatoes, chilly peppers, leeks, aubergines, courgettes and olives. Between 2003 and 2007, imports of garlic from DCs decreased.

Table 3.2 Imports by and leading suppliers of fresh vegetables to Belgium, 2003-2007, share in % of value

	2003 € mln	2005 € mln	2007 € mln	Leading suppliers in 2007 (share in %)	Share (%)
All fresh vegetables	457	482	594		
Intra EU	406	422	498	The Netherlands (44%), France (17%), Spain (15%), Italy (2.3%), Germany (1.9%)	84%
Extra EU ex. DCs	22	24	32	Israel (3.8%), Australia (0.9%), New Zealand (0.6%)	5.3%
DCs	30	37	64	Kenya (3.4%), Argentina (2.1%), Egypt (1.4%), Ethiopia (1.2%), Peru (0.9%), Senegal (0.6%), Chile (0.2%), Gaza + Jericho (0.2%), Morocco (0.1%), Turkey (0.1%)	11%
Other vegetables	110	130	171		
Intra EU	98	115	143	The Netherlands (45%), Spain (17%), France (11%), Poland (4.6%), Italy (3.7%)	84%
Extra EU ex. DCs	8	9	14	Israel (8%), USA (0.1%)	8.3%
DCs	3	7	13	Peru (3.1%), Kenya (2.4%), Gaza + Jericho (0.4%), Uganda (0.3%), Turkey (0.3%), Thailand (0.3%), Egypt (0.2%), Congo (Dem. Rep.) (0.2%), Cameroon (0.1%), Morocco (0.1%)	7.7%
Tomatoes	75	82	97		
Intra EU	72	77	92	The Netherlands (35%), Spain (32%), France (25%), Germany (1.1%), Italy (1.1%)	96%
Extra EU ex. DCs	2	4	1	Israel (1.4%)	1.4%
DCs	1	2	3	Senegal (2.3%), Morocco (0.6%), Egypt (0.1%)	3.1%
Alliaceous vegetables	63	58	90		
Intra EU	41	40	58	The Netherlands (37%), France (14%), Spain (11%), Poland (1.7%), Italy (0.4%)	65%
Extra EU ex. DCs	11	11	15	Israel (7%), Australia (6%), New Zealand (3.8%), Canada (0.1%)	16%

	2003 € mln	2005 € mln	2007 € mln	Leading suppliers in 2007 (share in %)	Share (%)
DCs	11	8	17	Argentina (14%), Chile (1.4%), Egypt (1.1%), Kenya (0.4%), South Africa (0.3%), Gaza + Jericho (0.3%), Ethiopia (0.3%), Mexico (0.1%), Pakistan (0.1%), Thailand (0.1%)	19%
Peas and Beans	65	65	76		
Intra EU	51	44	45	The Netherlands (32%), France (20%), Germany (3.4%), Spain (2.2%), Portugal (0.9%)	60%
Extra EU ex.	0	0	0	New Zealand (0.1%)	0.1%
DCs	15	20	31	Kenya (19%), Egypt (10%), Ethiopia (9%), Senegal (1.6%), Tanzania (0.5%), Peru (0.1%), Burkina Faso (0.1%), Guatemala (0.1%)	40%
Lettuce and chicory	52	47	56		
Intra EU	52	47	56	The Netherlands (45%), France (33%), Spain (14%), Italy (6%), Germany (1.5%)	100%
Extra EU ex.	0	0	0	Israel (0.1%)	<0.2%
DCs	0	0	0		0%
Edible roots	51	51	49		
Intra EU	51	51	48	The Netherlands (76%), France (12%), Spain (6%), United Kingdom (1.7%), Germany (1.3%)	98%
Extra EU ex.	0	0	1	Israel (1.5%)	1.5%
DCs	0	0	0	Morocco (0.1%)	0.1%
Brassicac	25	29	32		
Intra EU	25	29	31	The Netherlands (46%), France (28%), Spain (14%), Italy (5%), Portugal (3%)	98%
Extra EU ex.	0	0	0		0%
DCs	0	0	1	Kenya (2.1%), Turkey (0.1%)	2.2%
Cucumbers and gherkins	17	20	24		
Intra EU	16	19	23	The Netherlands (70%), Spain (22%), Germany (4.4%), France (1.1%), Italy (0.1%)	98%
Extra EU ex.	0	0	0	Israel (1.2%)	1.2%
DCs	0	0	0	Senegal (0.8%), Turkey (0.1%), Egypt (0.1%)	1%

Source: Eurostat, 2007, 2008.

Exports

Belgium is the fourth largest exporter of *fresh fruit* in the EU, after Spain, Italy and the Netherlands, accounting for 15% of the export value in 2007. While Spain and Italy are large producers of fruit, the Netherlands and Belgium are important re-exporters. In 2007, fruit exports amounted to 2.5 million tonnes, with a value of €2.1 billion. Between 2003 and 2007, exports increased 31% in value and 30% in volume. The main destinations were Germany (30% of export value in 2007), France (19%), the Netherlands (18%) and the UK (4%). The main destination outside the EU was Russia (7%). Bananas were the largest fruit product in exports (45% of total export value in 2007), followed by pineapples (9%), apples (9%), pears (9%) and kiwi fruit (8%). Antwerp is a major entry point to Europe for bananas, pineapples and off-season citrus fruit and grapes. Other exotic fruits are imported in smaller quantities. Most of the imports are exported to adjacent EU countries, but also to other EU countries.

Trends in exports closely follow trends described in imports. Re-exports are increasing for bananas and exotic fruits, but are decreasing for citrus fruits and grapes. Between 2003 and 2007, exports of bananas, pineapples, kiwi fruit, mango, watermelons, limes, passion fruit, caramola and pitahaya showed above average growth. Imports of these fruits also increased and since Belgium does not produce these fruits, re-exports are increasing.

Between 2003 and 2007, import and export value of grapes, oranges, plantains, lemons, mandarins, avocados, papaya, figs, and tamarinds, cashew apples, jackfruit, lychees and sapodilla decreased.

In 2007, Belgium was the fifth largest exporter of *fresh vegetables* in the EU. Exports amounted to 725 thousand tonnes, with a value of €652 million, which is 6% of the EU total. Between 2003 and 2007, exports increased 1% in value, but decreased 5% in volume. Most important products in exports were tomatoes (33% of total export value in 2007), agaricus mushrooms (9%), leeks (8%), cabbage and lettuce (7%), carrots and turnips and sweet peppers (each 6%). Main destinations were Germany, which accounted for 28% of total export value, France (23%), the Netherlands (18%) and the UK (11%). Based on the import and export data, Belgium is not an important re-exporter of products from DCs, but may re-export small volumes of beans, peas and asparagus.

Opportunities and threats

- + Belgium has a strong position in the trade of fresh fruit and vegetables in the EU. Belgium is a major entry point for bananas, exotic fruit and off-season citrus fruit and grapes.
- + Belgian imports of fresh fruit and vegetables are growing. Imports of fresh fruits grew 5% per year in value, while imports of fresh vegetables increased almost 7% per year in value.
- + Belgium is the third largest importer of fresh fruits from DCs, and with 65%, the share of imports of from DCs is much higher than the EU average. Imports of fresh fruit from DCs grew more quickly than the market. Growth was driven by increasing imports of bananas and exotic fruit, especially pineapples and mangos. Re-exports of these products increased.
- ± DCs accounted for only 11% of the imports of fresh vegetables, but imports from DCs grew much more quickly than the market (21% annually in value and 4% in volume).
- Except for small amounts of beans, peas and asparagus, Belgium is not an important re-exporter of fresh vegetables from DCs.
- Between 2003 and 2007, imports and re-exports of grapes, citrus fruits, avocados, papayas and plantains decreased.

Trends and market developments can offer both opportunities and threats to exporters. A given trend can be a threat to some and an opportunity to others. These trends should therefore, always be carefully analysed in relation to specific company circumstances. Further information is available in Chapter 7 of the CBI market survey 'The fresh fruit and vegetables market in the EU'.

Useful sources

- EU Expanding Exports Helpdesk – <http://exporthelp.europa.eu> → go to: trade statistics.
- Eurostat – official statistical office of the EU <http://epp.eurostat.ec.europa.eu> → go to 'themes' on the left side of the home page → go to 'external trade' → go to 'data – full view' → go to 'external trade - detailed data'.
- Understanding eurostat: Quick guide to easy comext → http://epp.eurostat.ec.europa.eu/newxtweb/assets/User_guide_Easy_Comext_20080117.pdf.

4 Price developments

Global supply and demand are important factors in the price setting of fresh fruit and vegetables from DCs. Prices may fluctuate strongly, as is the case for most commodities. Price fluctuations may show seasonal, annual and longer-term trends.

Throughout the various trade channels, different prices apply. Differences in national trade prices for these products may exist due to differences in the type and quality of the products, origin or intensity of the competition. Exporters are recommended to monitor markets and prices closely, in order to quote realistic prices. Importers and agents can give up-to-date information on the price levels of individual products.

General retail prices for food and drinks increased 14% between 2006 and October 2008. Retail prices for fresh fruit followed the trend of general food prices. Since 2006, the average price increased 17%. The trend in retail prices for fresh vegetables differs: overall, the average price decreased 14% between 2006 and 2008 (Table 4.1). The average price level for fresh vegetables is very dynamic. Due to the economic crisis, prices have come under pressure in 2008. Since the summer of 2008, prices are decreasing.

The average prices for fresh fruit and vegetables increased 16% on average in 2006. This was due to exceptional weather conditions, namely the hot and dry months of June and July and a cold and wet August. As a result, there was less produce and consequently a higher price. In 2007, the average price for fresh fruit and vegetables remained equal. The average price for fruit was €2 per kg, the average vegetable price was €2.20 per kg.

Retailers are increasingly adjusting (i.e. lowering) the prices of their private-labelled products to prevent consumers from choosing other products. Manufacturers of A-brands are also lowering their prices to remain competitive with hard discounters (ACNielsen, 2007).

Table 4.1 Consumer prices for food and drinks, fresh fruit and vegetables, 2006-2009, 2004=100

Year	2004	2005	2006	2007	2008	Oct. 2008
Food	100	n.a.	102	107	113	116
Fresh fruit	100	n.a.	98	101	107	115
<i>Bananas</i>	100	n.a.	105	97	100	105
<i>Oranges</i>	100	n.a.	102	110	117	123
Fresh vegetables			115	126	116	101

Source: Statbel, 2008

The CBI market survey 'The fresh fruit and vegetables market in the EU' provides more information on the price levels of fresh fruit and vegetables in the EU. Please consult the following websites for more information on prices in the Belgian market:

- Statistics Belgium, Statbel – <http://www.statbel.fgov.be>. Go to 'Indicators' and 'Consumer price indices';
- Belgian Federal Public Service, FOD – <http://minfin.fgov.be>;
- National Bank of Belgium – <http://www.nbb.be>. Go to 'Prices and wages';
- Freshplaza – <http://www.freshplaza.com>. Click on 'PriceWatch' for an overview of import and export prices.

5 Market access requirements

Exporters and manufacturers in a developing country preparing to access Belgium should be aware of the market access requirements of potential trading partners and Belgian and EU governments. Requirements are specified through legislation and through labels, codes and management systems. They are often based on consumer health and safety, environmental and social concerns.

For information on legislative and non-legislative requirements, go to 'Search CBI database' at <http://www.cbi.eu/marketinfo>, select fresh fruit and vegetables and Belgium in the category search, click on the search button and on market access requirements.

Food products intended for final consumers (finished, retail-packed products) must carry a label with information in the Dutch or French language. Additional information on packaging can be found at the website of ITC on export packaging: <http://www.intracen.org/ep/packit.htm>.

Tariffs and quota

For many fresh fruits and vegetables entering the Belgian market, an import duty has to be paid. This ranges from 0% for exotics such as papaya and passion fruits to 17.6% for nectarines. Entry prices or tariff quotas are commonly applied to fresh fruit and vegetables.

Countries that are part of the Generalised System of Preferences (GSP) of the EU can make use of preferential duty rates, which are substantially lower than the normal rates. See also the CBI market survey 'The fresh fruit and vegetables market in the EU' for more information on GSP. Tariffs, duty rates and quotas can be found at <http://exporthelp.europa.eu>.

For fresh fruit and vegetables sold in Belgium, the reduced Value Added Tax (VAT) rate of 6% applies.

6 Doing business

Information on doing business can be found in the CBI export manuals 'Export Planner', 'Your image builder' and 'Exporting to the EU'. Subjects covered include approaching potential business partners, building up a relationship, drawing up an offer, handling the contract, methods of payment and terms of delivery.

Cultural awareness is a critical skill in securing success as an exporter. Information on cultural differences in the EU can be found in Chapter 3 of the CBI export manual 'Exporting to the EU'. Each of these documents can be downloaded from <http://www.cbi.eu/marketinfo> - go to 'Search publications'.

Sales promotion

Visiting or participating in a trade fair can be an important promotional tool and way of approaching potential trading partners. In addition to those mentioned in the EU survey, the most relevant trade fairs for exporters of fresh fruit and vegetables to Belgium are:

- Innofresh – <http://www.innofresh.nl>, in Rotterdam, 21 to 23rd of September 2009;
- Horeca Expo – <http://www.horecaexpo.be>, in Gent;
- Fruit Logistica – <http://www.fruitlogistica.com>. The largest European trade fair for fruit and vegetables, with much attention to products from DC. Held every February in Berlin.

Trade journals, professional websites and newsletters are important sources of up-to-date information on developments in the Belgian fresh produce sector. In addition to those mentioned in the EU survey, the most relevant sources for exporters of fresh fruit and vegetables to Belgium are:

- VMT – <http://www.vmt.nl>. Trade journal for the Dutch and Belgian food industry (in Dutch only → translate with Babelfish – <http://babelfish.yahoo.com>).
- Freshplaza, <http://www.freshplaza.com>. Website with news on the European market of fresh fruit and vegetables, including Belgium.

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

Useful sources

More information on doing business in Belgium is available from the following sources:

- Quality Food, a website from Fevia, provides information on rules and regulations of quality demands in the Belgian food sector – <http://www.qualityfood.be>;
- Federation of the Food Industry, Fevia – <http://www.fevia.be> (in French and Dutch);
- VEGEBE – <http://www.vegebe.be>, Association for vegetable processing and trade in industrial vegetables;
- For more information on business culture and etiquette – <http://www.kwintessential.co.uk>.

This survey was compiled for CBI by Mercadero in collaboration with Piet Schotel.

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