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The Belgian Food Retail Market

Report Categories:
Retail Foods

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Report Highlights:
The annual revenue of the Belgian food retail industry for 2017 is estimated at around USD 32 billion. Sustainable and healthy food, including organic products, is one of the most important growth markets in food retail. American products have a small presence on the Belgian market but there are many U.S products with high sales potential such as nuts, berries, pulses and seafood.

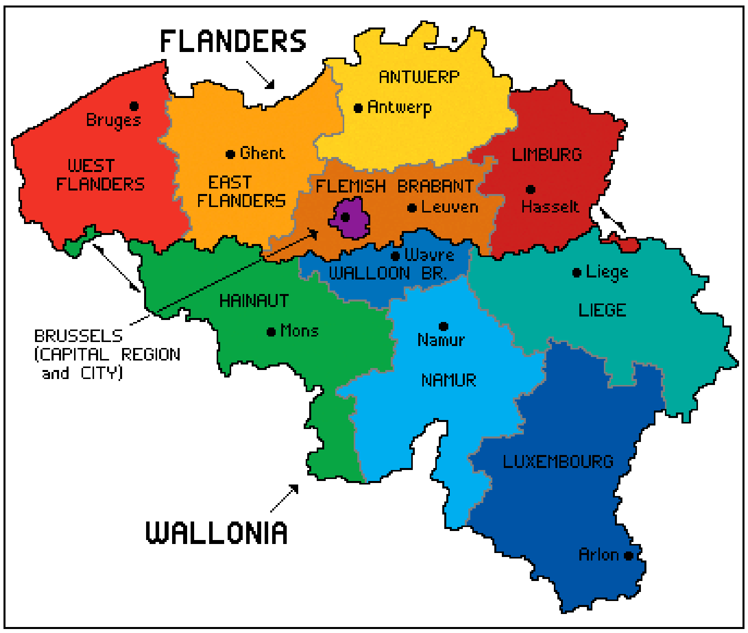
General Information:

SECTION I. MARKET SUMMARY

Belgium is a market of 11 million inhabitants with a high per-capita purchasing power. The gross domestic product per capita, based on purchasing power parity, was USD 46,550 [1] in 2017, higher than the European Union average of USD 41,170. The average Belgian family spends around USD 4,650 [2] on food and groceries per year. The price of food products in Belgium is, on average, higher than in neighboring countries. For the same products, Belgian consumers spend 13.4 percent more than in Germany, 12.9 percent more than in the Netherlands and 9.1 percent more than in France. [3]

The country is administratively divided into three parts: Flanders in the north (6.5 million inhabitants), Wallonia in the south (3.6 million inhabitants) and the capital, Brussels (1.2 million inhabitants). Agriculture, environmental matters and economic policies fall under the competencies of the three regions. This can have an impact on some sectors of the retail market such as local food availability and organic products. Purchasing power is also different in the three regions and in the provinces of the country; this can also have an impact on consumers' choices.

The Flemish (Dutch speaking) part of Belgium has a more Germanic culture, whereas Wallonia (French speaking) is closer to the French culture. Brussels has a more metropolitan culture, like other large European cities. With the difference in cultures also comes a difference in consumer habits and expectations.



Picture 1: Map of Belgium, Source: Benelux Chamber of Commerce

A. Belgian Food Retail Market

In 2016, according to a Nielson study, annual revenue of the Belgian food retail sector amounted to USD 31.5 billion. [4] For 2017, revenue was expected to increase further due to the good health of the Belgian economy and the increasing inflation rate (2.13 percent).

Table 1. Revenue, Belgian food retail in billion USD

2000	2002	2004	2006	2008	2010	2012	2014	2016
19.69	21.41	23.26	24.98	26.7	28.05	29.41	30.76	31.5

Source: Nielsen

There were 7,163 grocery stores in Belgium in 2016:

- 597 large supermarkets, operating on floor space of more than 1,500 square meters
- 1,352 medium-sized supermarkets, operating on floor space between 500 and 1,500 square meters
- 4,477 small retailers and/or convenience stores, operating on floor space below 500 square meters
- 737 hard discount stores [5]

The number of medium-sized and neighborhood supermarkets has been growing over the years to answer the need of Belgian consumers to have grocery stores closer to their homes. While the number of hard discount stores increased sharply over the beginning of the 2000, their growth rate has slowed down since 2010. Discount supermarkets are not as popular in Belgium as in other EU countries as Belgians see higher prices as indicative of quality.

In terms of market share, large supermarkets represent 49.5 percent of annual revenue of the Belgian food retail sector, medium-sized supermarkets represent 30.4 percent, small retailers/convenience stores represent 4.7 percent and hard discounters represent 15.4 percent.

The Belgian retail market is fairly consolidated. Eight different international groups dominate the Belgian retail market - Alhold Delhaize Group, Carrefour Group, Colryut Group, Louis Delhaize Group, Lidl, Aldi, Intermarché, Metro Group - and represent 92.1 percent of the market share.

Table 2. List of major Belgian retailers

Group name	Formats	Market share in percent	Nationality
Colryut Group	Colryut Okay Bio Planet Spar	26.6	Belgian
Carrefour	Carrefour Carrefour Market Carrefour Express	18.7	French

Alhold Delhaize	Delhaize Proxy Delhaize AD Delhaize Albert Heijn Shop & Go	18.6	Dutch
Aldi	Aldi	11.0	German
Lidl	Lidl	7.0	German
Louis Delhaize	Louis Delhaize Match Smatch Cora	4.7	Belgian
Metro Group	Makro	3.7	German
Intermarché	Intermarché	1.8	French

Source: FAS Brussels and Gondola.be

B. Current availability of U.S. Products

The average Belgian supermarket offers some products from the United States such as wine, tree nuts, cranberries, sweet potatoes, fish, snack foods, and condiments.

***White and red wines*:** Belgian wine production is low and therefore depends on imports. French, Spanish, Italian, Chilean and South African wines are the most popular in supermarkets with French dominating shelf space. In bigger supermarkets, wines are displayed by geographic regions such a Bourgogne, Provence or Bordeaux for French wines. American wines are also present but not in large quantities. They are typically displayed next to Chilean and Argentinean wines under the region “Americas” or “World Wine”. Most of U.S. wines present in Belgium retail markets come from large Californian wineries and they are priced between USD 6.00 and USD 10.00. Premium American wines are generally sold in specialized stores.

Tree nuts such as almonds, walnuts, pistachios and pecan nuts are increasingly popular. The nuts are also often mixed with dried fruits and sold in single-serving packages. The United States is a big supplier of tree nuts although there is competition from Spain, France, Moldova and Romania. Some retailers, such as Lidl and Carrefour, market American tree nuts as “higher quality nuts” and mention their state of origin, especially California almonds.

Picture 2. U.S. shelled pistachios at Delhaize
Source: FAS Brussels

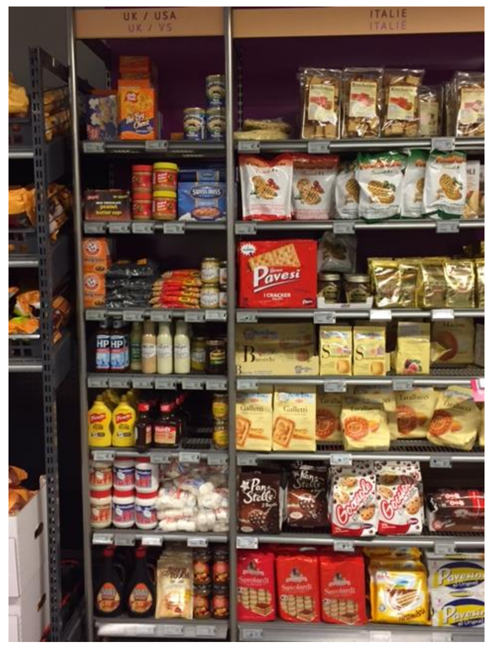
Spirits: Bourbon is found in all conventional supermarkets. Jack Daniel’s is the most common brand but other bourbon whiskey from Kentucky and Tennessee are also found in Belgian supermarkets.

Almost all Belgian supermarkets now sell ***sweet potatoes***, which are rapidly becoming commonplace. Although the majority comes from the United States, some supermarkets carry sweet potatoes from Spain and Honduras as well. Delhaize also carries American organic sweet potatoes at USD 5.00 per kilo.

Frozen and canned Pacific wild salmon can be found at all supermarkets. Canned salmon is packaged in cans of 170 grams and is sold between USD 2.00 and USD 3.00. Frozen salmon from the Pacific Northwest, usually filleted, is also found in all supermarkets at around USD 20.00 per kilo. Delhaize also offers smoked Alaskan wild salmon in its bigger stores for USD 10.00 per 150 grams. However, most smoked and fresh salmon in Belgian supermarkets comes from Norway or Scotland.

Iced teas and specialty drinks are becoming increasingly popular on the Belgian market, especially those with no sugar added. Iced teas manufactured in the U.S. can be found in most supermarkets.

Large Belgian supermarkets and hypermarkets like Carrefour and Delhaize also offer a special "**U.S. Foods Section**" next to other "world food". This is less common in smaller supermarkets and convenience stores. Products include yellow mustard, dressings, marshmallow Fluff, pancake mix, hot sauce, and peanut butter. Almost all supermarkets sell Tabasco red and green pepper sauces.



Picture 3. "U.S. Foods Section" in a supermarket stocked with: condiments, peanut butter, hot chocolate mix, beans, pancake syrup, popcorn kernels, baking soda, candy bars and chips.

Source: FAS Brussels

C. Trade in food products

Belgium is a small country geographically but is located at the heart of Europe with the French, the British, the Dutch and the German markets all easily accessible by road, rail or water transport. Belgium is also home to the Port of Antwerp, the second largest European port and the fourth largest in the world. All of this makes Belgium an ideal base to export food products to the EU.

In 2017, Belgium imported USD 36.4 billion worth of agricultural products. Imports from the United States totaled 651 million, up from 2016 by 1.88 percent. Imports of U.S. condiments and sauces (+6 percent), food preparations (+3 percent), spices (+36 percent), snack foods (+12 percent) nonalcoholic beverages (+85 percent), pulses (+76 percent), processed vegetables (+97 percent) and processed fruits (+16 percent) were all up.

Table 3. Belgian imports of agricultural, fish and forestry products in million USD

	2013	2014	2015	2016	2017
Total Imports	38,323	39,222	32,755	33,910	36,464
Imports from the U.S.	703	750	658	639	651

Source: USDA Global Trade Atlas

This report focuses on products that can be sold on retail markets within the following product categories:

- bulk agricultural products
- intermediate agricultural products
- consumer-oriented agricultural products
- fishery products

Of note, Belgium imports many agricultural products from its neighbor, the Netherlands, and therefore it is difficult to get a complete picture of U.S. imports into the country. The Netherlands is the top exporter to Belgium for almost all agricultural products.

The United States is the seventeenth supplier of **bulk products** overall to the Belgium market in 2017. Imports of bulk products were up 65 percent compared to 2016. Belgium is a large exporting market for American farmers for some bulk commodities as the United States is a top ten supplier of kidney beans, chickpeas, wheat, oats, peanuts, tree nuts and sunflower seeds.

Table 4. Belgian imports of bulk products in million USD, 2017

Rank	Country	USD	Percentage
1	France	1,053	16.4
2	Ivory Coast	514	8
3	Australia	380	5.9
4	The Netherlands	361	5.6
5	Germany	307	4.8
17	**United States**	**104**	**1.6**

Source: USDA Global Trade Atlas

The United States is the fifth supplier of **intermediate agricultural products** to Belgium with exports being relatively stable for the past four years. U.S. exporters are a top ten supplier of peptones and essential oils to Belgium.

Table 5. Belgian imports of intermediate products in million USD, 2017

Rank	Country	USD	Percentage
1	The Netherlands	2,731	36.9
2	France	1,863	25.1
3	Germany	753	10.2
4	United Kingdom	321	4.3
5	**United States**	**227**	**3.1**

Source: USDA Global Trade Atlas

The United States is also the twelfth exporter of **consumer-oriented products** to Belgium with U.S. farmers being a top five supplier of cat and dog food, fresh cranberries and blueberries, spirits, groundnuts, tree nuts and sweet potatoes. American wine is also sold to the Belgian market but wine sales decreased by 20 percent between 2016 and 2017. U.S. exporters are generally losing market share in consumer-oriented products, losing more than 6 percent in a year.

Table 6. Belgian imports of consumer-oriented products in million USD, 2017

Rank	**Country**	**USD**	**Percentage**
1	The Netherlands	6,890	30.5
2	France	4,470	19.8
3	Germany	2,728	12.1
4	Spain	1,097	4.9
5	Italy	964	4.3
12	**United States**	**323**	**1.4**

Source: USDA Global Trade Atlas

Finally, the United States is the sixteenth largest exporter of **fishery products** to Belgium. U.S. exports of seafood products to Belgium were up by almost 9 percent between 2016 and 2017. American fishers are the third largest provider of frozen fish – excluding fish fillets – to Belgium representing 12 percent of the market share in 2017. The United States is also the third exporter of mollusks and fifth exporter of frozen cooked lobster to Belgium.

Table 7. Belgian imports of fishery products in million USD, 2017

Rank	**Country**	**USD**	**Percentage**
1	The Netherlands	550	27.2
2	France	207	9.3
3	Germany	159	7.1
4	India	134	6
5	Vietnam	130	5.9
16	**United States**	**29**	**1.3**

Source: USDA Global Trade Atlas

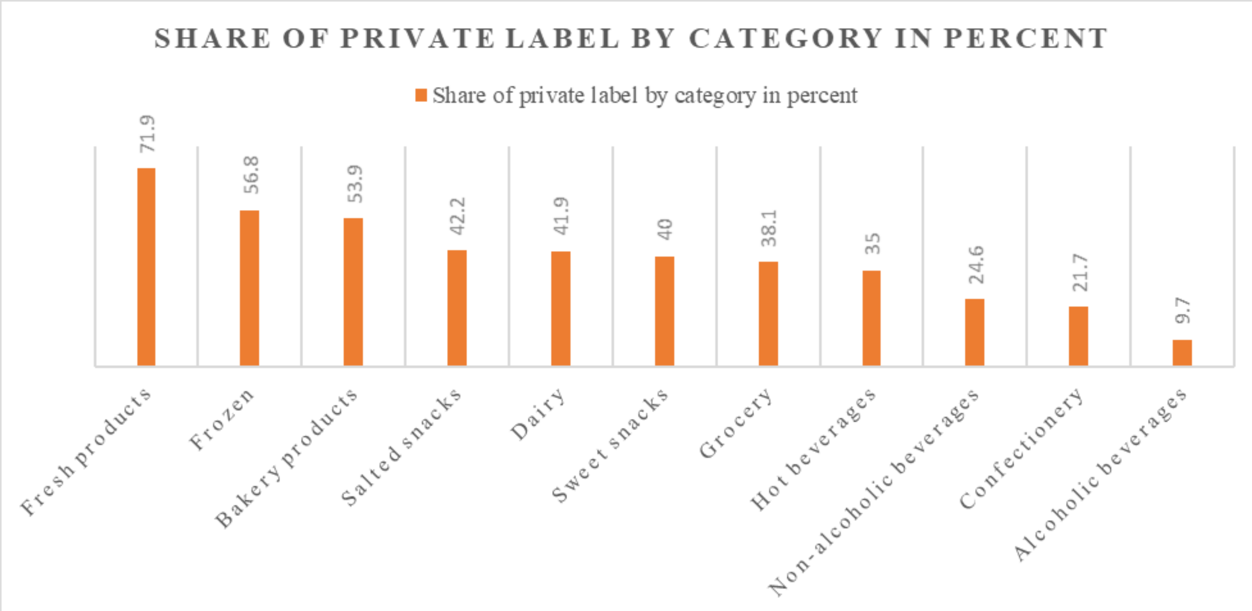
D. Trends in the market

Concerns about cost but also sustainability, health, food safety, and the origin of products, supporting local foods, convenience as well as e-commerce are changing the way Belgian consumers buy food.

a. Private label foods

Private label food are generic brands, exclusive brands or brands that bear the same name as the store retailer. In Belgium, private label foods have seen their value share triple in the past 30 years. In 2016, they represented 36 percent of the revenue of grocery stores in fast moving consumer goods.

Table 8. Share of private label foodstuff sold in Belgium by categories, 2016



Source: Nielsen and FAS Brussels

The market share of private label products is high in retail markets that are highly consolidated and innovative. Most retailers in Belgium have developed several private labels to focus on specific consumer preferences such as price, innovation and/or sustainability. The three biggest Belgian retailers (Delhaize, Carrefour and Colryut) each have up to four different lines of private labels on the market. Retailers are focusing on improving the quality and positioning of their private label brands. Consumers seem to appreciate this as good value for money and a good alternative to traditional branded products, which can be quite expensive in Belgium compared to neighboring countries due to territorial supply constraints.

Table 9. Overview of one retailer's (Delhaize) own labels

Name	**Description**	**Logo**
Delhaize	Mainstream Products	DELHAIZE
Delhaize Taste of Inspirations	Premium Products	taste of Inspirations
365	Value Products	365
Bio Delhaize	Organic Products	bio

Source: FAS Brussels

b. Organic, local and sustainable foods

The market share for organic products in Belgium continues to grow annually reaching 3 percent of total food sales in 2016. This more than doubled since 2008 when it was 1.5 percent. Meat substitution products (24.6 percent), eggs (14 percent) and fresh fruit and vegetables (4.3 and 6.6

percent respectively) have the highest market share.

Traditional supermarkets remain the largest distribution channel for organic products with 41.5 percent of all sales while hard discount supermarkets only represent 9.4 percent of the market. Direct sales by farms and neighborhood shops account for 3 and 2 percent respectively.

Specialized organic supermarkets and health stores now represent 31 percent of the market for organic products. There are around 450 and 500 [6] organic shops in Belgium. To answer the needs of the market, traditional retailers developed their own organic stores. The Colryut Group, for example, launched its own organic retail concept called Bio Planet in 2001 and has now opened 27 branches all over the country. They offer Colryut's private label organic products as well as fresh produce and animal products. Other organic supermarkets chains are growing in Belgium such as Origin'O with 14 shops in Belgium, Sequoia with 7 shops in Brussels or Färm with 6 shops in Brussels.

Belgian consumers are also increasingly conscious of the environmental footprint of food products. For example, an increasing number of Belgian consumers are turning away from meat as it is seen as environmentally resource intensive. Meat consumption decreased by 4 percent [7] in 2017 in Belgian households. Red meat consumption decreased by 20 percent since 2010 according to a GFK study [8], while white meat consumption decreased by 2 percent. Some consumers also prefer to eat local and European products compared to American or South American products because of the long distances for transport and the so-called "food miles." However, tropical fruits (bananas, pineapple, passion fruits, etc.) and new foodstuffs such as goji berries, which are imported, remain popular with Belgian consumers.

c. Transparency in the food supply chain

In the summer of 2017, Belgium was faced with cases of unauthorized presence of fipronil, [9] a restricted substance, in eggs. This created a food safety problem, which rapidly ballooned into an EU-wide crisis. In February 2018, a Belgian company owning slaughterhouses and cutting plants placing fresh meat on the market was found to be involved in fraudulent activities concerning labeling and forged freezing dates.

Following several food safety crises that affected the food supply chain in recent years, Belgian consumers are seemingly more suspicious of the agri-food industry- they are increasingly looking for locally produced food. This is pushing food manufacturers and retailers to be more transparent with food ingredients, manufacturing processes, and their supply chains. The Belgian food industry launched an information campaign "Food.be" to encourage consumers to buy food from local producers. This campaign is financed by regional public investments funds such as Flanders Investment and Trade, Wallonia Export and Investment and Vlam.be. Retailers are also launching campaigns focused on transparency. For instance, the Carrefour Group, which represents 18.7 percent of the market share, recently launched a blockchain supply chain [10] for its poultry products. The consumer, by scanning the QR code on the packaging, has access to each step of the production of the products (birth, rearing and slaughterhouse).

d. Healthy foods

Consumers are becoming more aware of and are more concerned about the effects food has on their health and well-being. In 2017, 90 percent of Belgians stated that eating healthily was important for them. [11] The following U.S. industries have all benefitted from this trend: healthy food snacks ("free from, low on and rich in" products), tree nuts (pistachios, almonds, peanuts, etc.), so-called super fruits (berries) and pulses (chickpeas, beans).

e. Online shopping and "drive-thru" services

Source: FAS Brussels

To answer consumers' needs for quicker and more convenient shopping experiences, retailers have developed e-food sales through numerous websites, drive-thru services as well as home delivery. In 2016, the total value of online grocery shopping in Belgium amounted to USD 1 billion according to a study carried out by Syndy. [12] The same study foresees a 100 percent growth predicted for Belgian e-food sales by 2021. However, some consumers are still reluctant to place online grocery orders due to the cost that is associated with the service. According to a study from the Belgian Federation for Commerce and Services (Comeos) [13], 25 percent of Belgian consumers surveyed in 2017 said they would never buy food online.

Picture 4. A Delhaize Supermarket with a drive thru service "Collect Delhaize".

SECTION II. HOW TO ENTER THE MARKET?

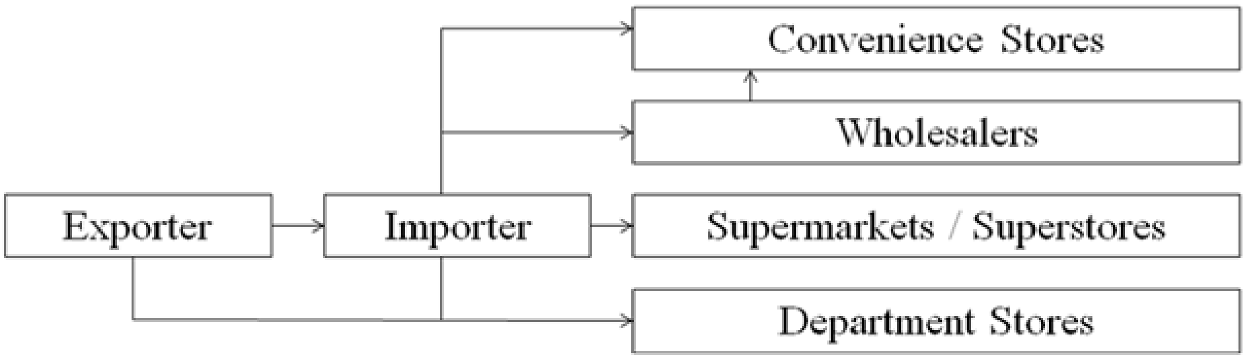
U.S. exporters wanting to enter the Belgian market have many opportunities. However, there are also a number of challenges U.S. exporters must meet before exporting food products to the Belgian market.

A. Entry strategy

Success in introducing your product in the Belgian market depends mainly on knowledge of the market and building personal contact with knowledgeable and established importers. An importer knows the market, the trade barriers and the required documentation. Prior to any export, invest in research that analyzes the Belgian food culture (concepts, flavor, price, requirements). It is important to keep in mind the different tastes and purchasing powers of the Walloon and Flemish communities in Belgium. Once the product has been chosen, exporters need to be aware of the highly competitive market here. There are also tariff and non-tariff trade barriers that can complicate exporting to the Belgian market. Information on the required certification is available in USDA's Belgium Food and Agricultural Import Regulations and Standards (FAIRS) Certification [2018 Report](). The EU also has several free trade agreements (a list can be found [here]()) which may advantage other third country competitors.

The Office of Agricultural Affairs (OAA) offers guidelines on business practices and import regulations. The OAA also maintains lists of Benelux buyers (FBL lists).

B. Market structure



Source: FAS The Hague

The vast majority of supermarkets and superstores buy foreign (specialty) products via specialized importers. 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. Department stores either work through importers or buy directly from U.S. exporters. Many imported intermediate products and even some consumer-oriented products are often processed, mixed or packed before being sold to the consumer. Products like nuts, fresh produce, wine and, in most cases, fish products fall in this category.

Retailers increasingly have their stores divided in different categories. For each category, they will have two or three preferred suppliers who are responsible for supplying the full range of products within the category. This way, the retailer negotiates with just a handful of suppliers for fruits and vegetables, meat products, seafood products, groceries, beverages, bakery products, etc. For the international specialty products (covering branded retail ready U.S. products) area within supermarkets, retailers usually work with only one or two specialized importers who are responsible for selecting products and filling those shelves.

As described in Section I, the retail industry in Belgium is rather consolidated. The following figures will give you an overview of the different buying combinations in Belgium.

Table 10. Leading Buying Groups in Belgium, 2017

Purchase Group	Market Share, percentage	Store Name
Carrefour Olympiadenlaan 20 B-1140 Brussels +32 2729 2111 www.carrefour.eu	18.7	Carrefour Carrefour Market Carrefour Express
Delhaize Group Osseghemstraat 53 B-1080 Brussels +32 2412 2111 www.delhaizegroep.com	18.6	Delhaize Proxy Delhaize AD Delhaize Albert Heijn Shop & Go
Colruyt Edingsesteenweg 196 B-1500 Halle + +32 2363 5545 www.colruyt.be	26.6	Colruyt Okay Bio Planet Spar
Aldi Keerstraat 4 B-9420 Erpe-Mere +32 5380 4861 www.aldi.be	11.0	Aldi
Louis Delhaize Rue de l'Espérance 84 B-6061 Montignies-sur-Sambre www.louisdelhaize.be	4.7	Louis Delhaize Match Smatch Cora
Lidl Guldensporenpark blok J nr. 90 B-9820 Merelbeke +32 9243 7400 www.lidl.be	7.0	Lidl

Source: FAS Brussels, Gondola

SECTION III. COMPETITION

The table below summarizes the competitive situation that U.S. suppliers face in the Belgian food-processing sector in terms of locally produced goods and imports and their respective market shares. In addition, the strengths of supplying countries and also the advantages and disadvantages of local suppliers are discussed below.

Table 11. Belgium's U.S. Market Share Versus Main Suppliers' Market Share in Consumer

Oriented and Fish & Seafood Products, (U.S. exports), Million USD, 2017

Product Category	Main Suppliers, in percentage		Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Meat Products (HS02) Total Imports: USD 1,623 From USA: USD 17	1. Netherlands 2. France 3. Germany **12. USA**	32 17 8 1	1, 2 and 3 are close to the market and offer good quality products.	Good domestic availability of beef and pork.
Seafood Products (HS03) Total Imports: USD 1,819 From USA: USD 27	1. Netherlands 2. France 3. India **16. USA**	23 9 6 1.5	3. Aquaculture supplier, especially for frozen shrimps and prawns.	Tradition in seafood trading; good geographical location.
Dairy Products (HS04) Total Imports: USD 4,198 From USA: USD 4	1. Netherlands 2. France 3. Germany **25. USA**	42 22 14 0.1	1, 2 and 3 are close to the market and offer diverse products.	Tradition of producing milk and other dairy products.
Vegetables (HS07) Total Imports: USD 2,152 From USA: USD 17	1. Netherlands 2. France 3. Spain **12. USA**	33 28 11 0.8	1, 2 and 3 are close to the market and offer good quality products.	Growing greenhouse horticultural industry.
Preparations of Meat and Fish (HS16) Total Imports: USD 1,108 From USA: USD 3	1. Netherlands 2. Germany 3. France **28. USA**	31 18 17 0.3	1, 2 and 3 are close to the market and offer good quality products.	Tradition of preparation of cured meat (charcuterie).
Preparations of Vegetables and Fruits (HS20) Total Imports: USD 2,009 From USA: USD 17	1. Brazil 2. Netherland 3. France **13. USA**	26 24 12 0.8	1. Good price/quality ratio 2 and 3 are close to the market and offer good quality products.	Not (sufficiently) domestically available.
Other Edible Preparations (HS21) Total Imports: USD	1. Netherlands 2. France 3. Germany **6. USA**	30 21 17 3	1, 2 and 3 are close to the market and offer good quality products.	Not (sufficiently) domestically available.

1,359 From USA: USD 41				
Wines (HS 2204) Total Imports: USD 1,044 From USA: USD 13	1. France 2. Spain 3. Italy **9. USA**	55 11 8 1	1, 2 and 3 are close to the market and offer good quality products.	Not domestically available.
Dried leguminous vegetables (HS 0713) Total Imports: USD 100	1. France 2. Canada **3. USA**	34 13 10	1, 2 and 3 can respond to growing demand in the market that cannot be met locally.	Very low local production

Source: USDA Global Trade Atlas

SECTION IV. BEST PRODUCT PROSPECTS

A. Products Present In The Market That Have Good Sales Potential

- Nuts (almonds, peanuts walnuts, pistachios, pecan and hazelnuts)
- Beverages (iced teas, sodas)
- (Super) fruits containing high levels of antioxidants like pomegranates, cranberries, blueberries, etc.
- Pulses
- Seafood

B. Products Not Present In Significant Quantities But Which Have Good Sales Potential

- Functional/health foods
- Organic products
- Innovative sauces, condiments and confectionary products

C. Products Not Present Because They Face Significant Barriers

- Poultry
- Processed food with GMO ingredients, bleached flour etc.

SECTION V. POST CONTACT AND FURTHER INFORMATION

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Additional information can be found on the USDA FAS European Union website: www.usda-eu.org.

The EU uses the Combined Nomenclature (CN) for the customs classification of goods. The CN eight digit code numbers are based on the Harmonized System (HS) nomenclature: the first six digits refer to the HS headings; the two following digits represent the CN subheadings. The EUs on-line customs database (TARIC) can be consulted to look up commodity codes and relevant import duties: http://ec.europa.eu/taxation_customs/dds2/taric/taric_consultation.jsp?Lang=en

More information on Belgium's customs authorities can be found at http://fiscus.fgov.be/interfdanl.

Related Reports:

- FAIRS Export Certificate Report 2017 - Belgium
- FAIRS Narrative 2017 - Belgium

[1] The International Monetary Fund, http://www.imf.org/external/datamapper
[2] 1 euro = 1.23 dollars
[3] Gondola, "Les Belges paient leurs courses de 9 à 13.4% moins cher chez nos voisins", http://www.gondola.be/fr/news/food-retail/les-belges-paient-leurs-courses-de-9-13-4-moins-cher-chez-nos-voisins
[4] The Nielsen Company, LLC, *Grocery Universe 2017 – Results of the 55th inventory of retail grocery in Belgium, drawn up by Nielsen*
[5] "A hard discount store is an outlet for the sale of foodstuffs on a self-service basis, under a specific ensign, and with a surface area of 400 to 800 m2" – Institut National de la statistique et des études économiques (INSEE). In its report, Nielsen considers Lidl and Aldi as the two hard discounters in Belgium.
[6] Natexbio, "La distribution des produits naturels et bio en Belgique", https://www.natexbio.com/distribution-produits-naturels-bio-belgique/
[7] Le Soir, "Les Belges mangent moins de viande", http://sosoir.lesoir.be/les-belges-mangent-moins-de-viande
[8] Filagri, "(Consommation de viande) Etat des lieux de la consommation moyenne du belge", https://filagri.be/viande-etat-des-lieux-de-la-consommation-moyenne-du-belge/
[9] See GAIN Report, Belgian Fipronil Crisis - Fraud or Food Safety
[10] Gondola, "Après la France, Carrefour lance la première blockchain alimentaire belge", http://www.gondola.be/fr/news/food-retail/apres-la-france-carrefour-lance-la-premiere-blockchain-alimentaire-belge
[11] Weber Shandwick, "Tendances alimentaire 2017 en Belgique", http://webershandwick.be/wp-

content/uploads/2017/03/2017-Tendances-Alimentaires-en-Belgique.pdf
[12] Syndy, “The state of online grocery retail in Belgium”, http://syndy.com/state-belgian-online-grocery/
[13] Comeos, “E-commerce Belgium 2018”, https://static.comeos.be/E-commerce_Belgium_2018.pdf