

# Belgium, the premium supplier of European fresh produce

## Production

### **Belgian fruit production**

Belgian fruit production focuses on pears, apples and strawberries. This year, unfortunately, Belgian fruit growers suffered at the end of April from a late-night frost. The result: the apple production decreased enormously (-68%), but the pear production only lost about 7% of the volume.

Belgium still remains an important player on the international fruit market. Last year, the pear production rose to 10,023 hectares, representing 14% of European pear production. The Conference pears especially are a well-known Belgian specialty. About 85% of the European pear production is situated in only 5 countries: Italy, Spain, Belgium, The Netherlands and Portugal. Total European pear production is estimated to be 2.1 million tons in 2017, a decrease of 1% in comparison with 2016.

European apple production decreased with more than 20%. Belgium only represents about 1% of the European production and is a minor player on the European level. The surface of Belgian apple production decreased again and ended up at 6,164 hectares.

Strawberry production in Belgium is rather stable. In 2016, total production was 45,000 tons, realized on a surface of almost 2,000 hectares. Growers invest more and more in ultramodern glasshouses and in production methods and varieties to lengthen the season. It gives the opportunity for retailers to offer their customers more variety in their fruit assortment, also during autumn and winter.

Following the trend of an increasing consumption of berries, we also notice a shift of different producers towards the production of berries, mainly raspberries and blueberries.

### **Vegetable production in Belgium**

In 2016, the total Belgian vegetable production reached 1.7 million tons, with a share of 22% for glasshouse production. The main products of open field are leeks, carrots, Belgian endive, zucchini, celeriac and cauliflowers. For covered production, tomatoes are by far the most important product. Also cabbage lettuce, bell peppers and cucumbers are important.

Remarkable is the evolution towards specialties, and this is for a wide range of vegetables. Producers notice that consumers are asking for specialty vegetables and believe they have a great future. Hence their efforts and investments are following the consumers trends. We notice a very broad range of tomatoes – different sizes, shapes, colors and, of course, taste. The message: for every moment, you find a suitable tomato, whether you are making a salad, preparing sandwiches, choosing a tasty tomato sauce or just want a healthy snack. Also, the assortment of peppers is widening: sharp or sweet peppers, the traditional red or more colorful ones, huge sizes or baby-paprikas for snacking... Snacking sizes also become more popular in the cucumber range, and zucchini is forming a whole family of shapes and colors.

Next to more varieties, Belgian producers also invest in enlightened (LED light) production, so they can offer fresh produce all year round. Easy for retailers, but also interesting for consumers who expect a year-round availability of basic products like f.i. tomatoes.

## Export

Belgium exports, in terms of volume, are mainly fresh tomatoes, pears, apples and carrots. Year 2016 was notably good for pears, but less for apples, due to the bad weather conditions and the destruction of some of the harvest as a result of the Russian ban. Other important Belgian export products are strawberries, cabbages, cucumbers, leek and bell peppers. For the cucumbers, in particular, we notice a very stable growth. In general, the slight decrease in the export of fresh fruits is mainly due to lower volumes of southern fruits. The export of fresh vegetables is increasing due to rising exports of tomatoes, cucumbers, onions, zucchini, bell peppers and celery.

### **Belgian fresh fruits more popular in Eastern European markets**

Main export markets for fresh fruits are the European markets (98% share), with our neighboring countries in the top 3. The market share of Germany has in 10 years slightly decreased from 30% to 27%, while the share of France increased from 17% to 20%. The share of The Netherlands evolved from 18% towards 15% in 2016. On the contrary, East European markets are gradually importing more Belgian fruits, with rapidly increasing Czech Republic in front (good for 6%), followed by Poland (5%). The share of Lithuania and Latvia has decreased in 2016, but they still import 3 to 5 times more than 10 years ago. Italy is becoming less important for Belgian exports of fresh fruits. On the other hand, the export to India, rather a new market, sets its significant growth further in 2016.

### **Belgian vegetable export: France and Holland top markets**

Also for Belgian vegetables, the European markets are the main export destinations, with a share of 98%. Our neighboring countries are here also in the top 3, but in a different order. France is the top market with a share of 37% in 2016, followed by the Netherlands with a share of 23%. Both countries have slightly increased their shares in the past 10 years. The share of Germany fluctuates and stayed at a level of 20% in 2016. Far behind these markets, we see the UK (5%) on the fourth and Spain (3%) on the fifth place. Eastern European markets, Poland and Czech Republic together realize a share of 4% in 2016. Third countries represent only a share of 2% in the Belgian export of fresh vegetables. Belgian vegetables are exported to some African markets like Cote d'Ivoire and Senegal. Also, the United States and Canada purchase Belgian vegetables.

### **Belgian import of fresh fruits is stable, while the import of vegetables is increasing.**

More than 60% of the Belgian imports of fruits comes from third countries (Colombia, Costa Rica and Ecuador), due to the tropical fruits. Concerning the European markets, The Netherlands, Spain and France are main European suppliers for fruits to Belgium. Shares are even increasing.

For vegetables, the Netherlands and France are the main suppliers with a share of 81% in the Belgian import of vegetables. Third countries supplying vegetables to Belgium are Australia, New-Zealand and some African countries like Egypt, Senegal and Kenya. Main imported vegetables are carrots, onions and shallots, peas and other fresh vegetables.