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Belgium-Luxembourg

Retail Food Sector

Report

2002

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Report Highlights:
This report highlights the latest developments in the Belgian retail food sector.

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
The Hague [NL1], BE

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Section I. Market Summary

! Sales by the retail food sector rose in 2001 to ¡ 16.72 billion , an increase of 4.8 percent compared over 2000. The inflation level was 2.5 percent (based on consumer price index), the same as in the previous year.

! Every year the Belgian food sector includes fewer points of sale. In 2001 the number of total points of sale fell to 9,192, half as many as in 1980.

! The market share of large-scale stores and non-integrated medium-sized stores fell slightly in 2001. At the same time, the market share of integrated medium-sized stores such Aldi and Lidl rose by 15.3 percent due to the numerous openings of hard-discount type stores. Superettes and traditional stores lost share through closures. The number of such stores fell by 725 (-9.5 percent) between 2000 and 2001 due to the closing of 537 traditional service shops (through bankruptcies and closures) and the disappearance of 188 superettes. A large number of these superettes were closed, while others were expanded and converted into non-integrated medium-sized distribution stores.

! The total market share of discounters rose to 29.5 percent in 2001, up from 23.8 percent five years earlier. Among "the hard discounters" this was achieved through store openings, and among "the soft discounters" through sales growth in existing outlets.

	Number of Stores			Share			Value of sales ($ mill)		
	1999	2000	2001	1999	2000	2001	1999	2000	2001
Hypermarkets	82	78	74	15.7%	15.4%	14.3%	2,619	2,261	2,141
Supermarkets	2,085	1,919	1,962	72.4%	72.6%	74.8%	12,077	10,658	11,197
Superettes	2,668	2,642	2,441	8.2%	8.6%	7.9%	1,368	1,262	1,183
Traditional Stores	5,841	5,252	4,715	3.7%	3.4%	3.0%	617	499	450
Total Foodstores	**10,676**	**9,891**	**9,192**	**100%**	**100%**	**100%**	**16,681**	**14,679**	**14,969**

Source: AC Nielsen

! According to a Ministry of Economic Affairs study conducted in April 2002, the introduction of the Euro has had no inflationary effect on the retail food sector. There has been a limited increase in prices (less than 2 percent) in the following types of stores: small food stores, butcher shops, night shops and superettes. Indeed, average price levels in the large supermarkets and hypermarkets have even fallen slightly by 0.4 percent.

! Private label market share rose from 27.6 percent in 1997 to 30.1 percent in 2002. Within the frozen products category, the share of private labels rose to 49 percent Private labels have almost tripled their market share since 1983. Their share stagnated between 1998 and 2000 (with a 28 to 29 percent market share) but in 2001 they again set a new record. The growing success of private labels is due to an improvement in the quality of most products, product range diversity and the globalization of some distribution formulas (e.g. introduction of Delhaize and Carrefour brands into non-integrated distribution chains).

! Many of the frozen and dairy private labels have progressed from lower to higher quality products and they are now fully accepted by consumers. However, private labels encounter greater difficulties in sweets and alcoholic beverages, where innovation and strong communication around national brands are decisive success factors.

Private Label Share by Product Category (in percentage)

Frozen Products	49
Dairy Products	39
Petfood	35.1
Grocery	33.7
Hot Beverages	33.6
Bakery Products, Biscuits	29.4
Non-Alcoholic Beverages	26.3
Alcoholic Beverages	16.7

Source: ACNielsen

Section II. Road Map for Market Entry

Entry Strategy

The best way to enter the Belgian market is through a local contact such as a Belgian importer. Major retail groups may also import directly and some exporters may prefer to have a local agent. Importers commonly specialize in a limited number of products/product categories. As a result, they are able to provide market knowledge and guidance on food and trade related laws, including requirements for ingredients, packaging and labeling. OAA Brussels maintains lists of existing and potential importers.

Market Structure:

* Most importers are also active as wholesalers and/or distributors.
* For large quantities, retailers may prefer to import directly.
* Exporters looking to develop their brand names, may prefer to work with an agent.

BELGIUM: Number, Market Share and Average Sales of Stores by Size									
	1999			2000			2001		
Description	No.	Market Share %	Average Sale/Store Mil. Euro	No.	Market Share %	Average Sale/Store Mil. Euro	No.	Market Share %	Average Sale/Store Mil. Euro
F1 Mass Distribution	519	51.5	15.5	517	52.2	16.2	515	52	16.9
Colruyt N.V. (Discount Colruyt), Delhaize "Le Lion" (Supermarkets), Carrefour: Carrefour, Super GB, Louis Delhaize Group: Cora and Match, Group Mestdagh: Super M and Champion									
F2i Integrated (corporate run) Medium-Sized Distribution	728	14.7	3.16	686	14.2	3.32	740	15.3	3.46
Aldi, Delhaize "Le Lion": Delhaize 2 & Delhaize City, Lidl, Louis Delhaize Group: Profi, Laurus: Battard, Central Cash									
F2ni Non-Integrated (franchised) Medium-Sized Distribution	1,086	24.4	3.52	1,069	24.9	3.73	1,043	24.8	3.98
Alvo, Delhaize "Le Lion": AD Delhaize & Superettes Delhaize, Group Carrefour: Unic, Nopri, Super GB Partner, Intermarché, Samgo, Laurus: Spar, Unidis Supermarkets, Distrigroup 21: Cash Fresh, Lambrechts: Carat, Spar and other independent supermarkets with surface of 400 m^2 or more									
F3 stores with a surface < 400 m^2; self-service stores, traditional stores, including night stores	8,343	9.4	0.18	7,619	8.7	0.19	6,894	7.9	0.19
TOTAL NUMBER OF STORES	**10,676**		**1.47**	**9,891**		**1.62**	**9,192**		**1.82**

Source: ACNielsen - Grocery Universe 2002

Company Profiles:

In Belgium, supermarkets account for the majority of the total value of food and grocery sales. Hypermarkets accounted for 15 percent of total sales in 2000 and 14 percent in 2001, while traditional stores have become insignificant, with barely 3 percent. The average turnover of traditional stores is very small; after deductions of operating costs and taxes, many have difficulty surviving.

The average turnover per retail store in Belgium in 2001 is shown in the following table.

The Five Largest Food Buying Organizations in Belgium in 2001			
Retailer/Wholesaler - type of outlet	**Market share in Euros & %**	**Number of Outlets**	**Purchasing**
Carrefour Belgium, Buying organization for supermarket chains Carrefour, GB Contact, GB Express, GB Super, GB Super Partner, Rob	4.7 billion 26.2 percent	452	Direct, Imp./ wholesaler
Delhaize Le Lion, Buying organization for supermarket chains AD Delhaize, Bio Square, Delhaize City, Delhaize 2, Delhaize Proxy & Superettes, Delhaize Take'n Go, Delhaize Shop 'n Go, Delhaize Supermarkt, Di, Tom & Co, and Caddy Home	3.2 billion 24.7 percent	675	Direct, Imp./ wholesaler
Louis Delhaize, Buying organization for supermarket chains Cora, Louis Delhaize, Louis Delhaize L'Epicier, Delitraiteur, Match, Profi and Smatch	1.4 billion 7.8 percent	519	Direct, Imp./ wholesaler
Colruyt, Soft Discounter	2.1 billion 13.0 percent	187	Direct, Imp./ wholesaler
Aldi, Hard Discounter	1.6 billion 10.1 percent	346	Direct, Imp./ wholesaler

Source: Store Check Food Distribution Guide 2002-2003

Number of Stores, Share in Total Sales, and Average Turnover per Store - 2001			
	Number	**Share in Total Sales (%)**	**Average Turnover per Store** (000 Euros)
Hypermarkets	74	14.3	32,252
Large supermarkets	641	45.6	11,892
Small supermarkets	1,321	29.2	3,691
Superettes	2,441	7.9	541
Traditional Stores	4,715	3.0	106

Source: ACNielsen

All Discounters in Belgium Total for 2001 - **874**		
Type	**Chains**	**Characteristics**
Soft Discounters	9 Colruyt 9 Profi 9 Central Cash 9 Intermarché	± Low Price ± Private Labels, generic products, exclusive and national brands ± Sales of practically all product groups
Hard Discounters	9 Aldi 9 Lidl	± Low prices ± Limited product range

Source: ACNielsen

With 874 discounters at the end of 2001, Belgium reached a new high in the number of discount stores.

In 2001 new stores were opened only within the "hard discounters" group. Belgium today counts 510 hard discount stores and 364 soft discount stores. The rate at which hard discount retail stores are opening reflects both the success of their formula and the ease of opening such stores.

Number of Stores between 1996 and 2001

	1996	1997	1998	1999	2000	2001
Soft	327	344	354	364	365	364
Hard	435	471	451	479	450	510
Total	762	815	805	843	815	874

Source: ACNielsen

The following table shows how soft and hard discounters are progressing with regard to market share.

Market share per type of discounter

	1996	1997	1998	1999	2000	2001
Soft	13.3	14.5	15.2	15.8	16.6	17.1
Hard	11.4	11.9	11.3	11.5	11.2	12.4
Total	23.8	24.8	26.4	26.5	27.3	29.5

Source: ACNielsen

Leading Retailers

- **CARREFOUR BELGIUM**

In 2000, Carrefour, the largest European retail group and the number two worldwide, took over GB, which was the leading supermarket chain in Belgium. The first priorities of Carrefour, who was only marginally present in Belgium before, was to rebuild market share and to stem losses. It did this by aggressively lowering prices and reducing operational costs. This policy led to a price competition with Colruyt. At the same time, Carrefour decided to invest heavily ($150 million in 2001 only) in restructuring, starting with the conversion of 56 GB hypermarkets into Carrefour stores by the end of 2001. The group also intends to further develop franchising of "Super GB Partner," "Contact GB" and "GB Express." The group’s ambition is to open 50 new supermarkets in the coming years.

- **DELHAIZE "LE LION"**

The number two supermarket operator in Belgium. It has a quality image and a strong reputation for product innovation. Over the last few years, Delhaize has shown steady growth, mainly as a result of takeovers. In an effort to increase sales from smaller stores, Delhaize converted some of its superettes into the new neighborhood stores "Delhaize Proxy." In addition, they are expanding the convenience formula "Shop 'n Go," located in gas stations and soon to be opened as stand-alones. The group's most recent innovation is "Bio Square," a store selling 100 percent organic products. Delhaize also sees a future in e-commerce with the home delivery service "Caddy Home," the "Take 'n Go" service, as well as its websites Delhaizewineworld.com and Delhaizegifts.com.

Delhaize group mainly focuses on quality, premium foods and convenience. Since early 2002, it has followed an "Every Day Fair Price" policy, reducing prices and discontinuing all promotions as a reply to Carrefour's agressive pricing policy. The group is member of EMD, the largest European purchase center.

' **COLRUYT**

Belgium's third largest supermarket, Colruyt won the price war with Carrefour in 2001 and continues to use the same strategy. These traditional discount supermarkets are enlarging their product ranges. They have a basic "discounter" look with warehouse racking. The discounter has further invested in a multi-channel approach, with a Collishop division (catalog purchases), Collivery (home delivery service), and an internet shop with pick-up locations named "Collect & Go."

In order to follow the convenience trend, Colruyt began opening "Okay" neighborhood stores in 1998. "Okay" stores are limited to 400 m^2 and 3,000 products. The chain expects to open 5 new "Okay" shops every year. In addition, Colruyt has also opened all-organic supermarkets under the name "Bio Planet" (see BE1048 and BE 2025). The first one was opened mid-2001 and the second one in April 2002. According to the COLRUYT group, the past year has demonstrated that there is a viable market for organic food and non-food products. Just like the first, the second "Bio-planet" sells 6,500 products which are also available on-line at www.bio-planet.be.

In the long run, the group intends to open another 40 to 50 new Colruyt stores in Belgium. In 2000, Colruyt joined the European purchase alliance Europartners in which the group works together with the Dutch group Superunie.

COLRUYT and ALVO, another smaller supermarket chain, intend to consolidate their purchasing functions as of March 2003 in order to lower costs (see details in BE2026).

' **LOUIS DELHAIZE**

As the name suggests, Louis Delhaize shares the same beginnings as Delhaize "Le Lion". The two split in 1962. It is a subsidiary of the French group Cora.

The group Louis Delhaize has begun a renovation and re-branding of outlets over the last year. "Match" supermarkets have been modernized one by one. In 2001, the first "Profi" discount stores were converted into "Smatch" stores. These stores are not discounters but small convenience supermarkets which emphasizes freshness.

' **ALDI**

Aldi, originally a German chain, is one of the top ten European food retailers, and ranks fifth in the Belgian market. The first outlet was opened in Belgium in 1976. Aldi's strategy is well-known: a limited range of 600 basic products with a maximum of two brands per product together with a sober decor of the stores. Approximately 70 percent of the product range is of Belgian origin. Some of the products imported are bought jointly via the German parent company. The Belgian outlets belong to the German Aldi group.

' **OTHER**

Major Food & Non Food Buying Organizations	
BLOC CVBA	14 members of which 10 in Belgium Turnover: 4.6 billion euros
	-discounters & cash & carry (494) - supermarkets (7,768) - retailers, (1,673) - restaurants (10)
	- imports directly - develops new branded products - negotiates contracts for direct deliveries to members
VAC Cooperative	- member of the BLOC group since 2001 - forms a group of 720 independent retailers and small buying groups, -Total sales of all members estimated at 50 billion Euros
	-Finalizes basic contracts with suppliers -VAC does not handle distribution

Source: Store Check Food Distribution Guide 2002-2003

In Belgium, 2,122 gas stations also operate small stores. These stores offer candy, soft drinks and, occasionally, sandwiches. They are not covered in this report as they do not sell products imported from the United States. One petrol company supplies its Belgian shops from The Netherlands, while all others are supplied by Lekkerland, a German owned company, and Sugro, which also belongs to Lekkerland. Delhaize operates only sixteen "Shop and Go" stores at gas stations, while Carrefour has only five "GB Express" shops. Traditional markets do not offer imported products from the United States either.

Section III. Competition

Belgian and Luxembourg food imports are almost exclusively sourced from other EU countries. Imports from third countries come mainly from former colonies and consist of products for which European production is deficient, like nuts, fruit juices and seafood. For some fruits and vegetables, North African countries have become successful suppliers.

Consumer Food & Edible Fishery Products Imports

BELGIUM - Imports	Imports from the World			Imports from the U.S.			US Market Share		
(In Millions of Dollars)	1999	2000	2001	1999	2000	2001	1999	2000	2001
CONSUMER-ORIENTED AGRICULTURAL TOTAL	10,107	9,606	9,924	200	189	156	2%	2%	2%
Snack Foods (Excl. Nuts)	611	548	623	4	2	2	0.61%	0.42%	0.33%
Breakfast Cereals & Pancake Mix	59	58	69	2	1	1	3%	2%	0.49%
Red Meats, Fresh/Chilled/Frozen	499	449	500	22	12	12	4%	3%	2%
Red Meats, Prepared/Preserved	293	299	341	1	1	1	0.01%	0.01%	0.01%
Poultry Meat	197	197	242	0	0	0	0%	0%	0%
Dairy Products (Excl. Cheese)	1,286	1,282	1,270	1	1	1	0.01%	0%	0.04%
Cheese	731	694	759	1	1	0	0%	0.01%	0%
Eggs & Products	61	59	54	3	3	1	4%	6%	0.29%
Fresh Fruit	1,527	1,408	1,427	14	10	12	0.94%	0.71%	0.82%
Fresh Vegetables	500	429	486	1	1	1	0.04%	0.01%	0%
Processed Fruit & Vegetables	790	748	770	16	15	13	2%	2%	2%
Fruit & Vegetable Juices	548	539	464	66	62	34	12%	12%	7%
Tree Nuts	108	125	124	12	21	24	11%	17%	19%
Wine & Beer	843	799	762	7	7	6	0.85%	0.86%	0.75%
Nursery Products & Cut Flowers	276	271	288	4	4	6	1%	2%	2%
Pet Foods (Dog & Cat Food)	234	229	233	14	12	15	6%	5%	6%
Other Consumer-Oriented Products	1,544	1,474	1,511	36	38	32	2%	3%	2%
FISH & SEAFOOD PRODUCTS	997	1,025	996	17	17	15	2%	2%	2%
Salmon	78	79	72	5	6	5	7%	7%	7%
Surimi	4	5	2	1	1	0	0.17%	8%	0%
Crustaceans	383	367	360	4	5	3	1%	1%	0.74%
Groundfish & Flatfish	231	290	273	3	2	3	1%	0.59%	0.98%
Molluscs	86	93	100	1	1	1	0.67%	0.07%	0.64%
Other Fishery Products	215	192	189	4	4	4	2%	2%	2%
AGRICULTURAL PRODUCTS TOTAL	15,570	14,622	15,430	453	449	353	3%	3%	2%
AGRICULTURAL, FISH & FORESTRY TOTAL	18,234	17,428	18,020	559	539	431	3%	3%	2%
Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office									

LUXEMBOURG - Imports	Imports from the World			Imports from the U.S.			US Market Share		
(In Millions of Dollars)	1999	2000	2001	1999	2000	2001	1999	2000	2001
CONSUMER-ORIENTED AGRICULTURAL TOTAL	721	696	NA	13	12	NA	2%	2%	0%
Snack Foods (Excl. Nuts)	52	53	NA	1	1	NA	0%	0%	0%
Breakfast Cereals & Pancake Mix	7	6	NA	0	0	NA	0%	0%	0%
Red Meats, Fresh/Chilled/Frozen	56	50	NA	0	1	NA	0%	0.11%	0%
Red Meats, Prepared/Preserved	39	39	NA	0	0	NA	0%	0%	0%
Poultry Meat	16	16	NA	0	0	NA	0%	0%	0%
Dairy Products (Excl. Cheese)	40	39	NA	0	0	NA	0%	0%	0%
Cheese	40	40	NA	0	0	NA	0%	0%	0%
Eggs & Products	7	6	NA	0	0	NA	0%	0%	0%
Fresh Fruit	37	34	NA	1	1	NA	0.04%	0.04%	0%
Fresh Vegetables	36	33	NA	1	1	NA	0.23%	0.24%	0%
Processed Fruit & Vegetables	40	39	NA	0	1	NA	0%	0.01%	0%
Fruit & Vegetable Juices	12	12	NA	0	0	NA	0%	0%	0%
Tree Nuts	34	38	NA	12	11	NA	37%	29%	0%
Wine & Beer	85	82	NA	1	1	NA	0.05%	0.11%	0%
Nursery Products & Cut Flowers	18	18	NA	0	0	NA	0%	0%	0%
Pet Foods (Dog & Cat Food)	12	12	NA	0	1	NA	0%	0.10%	0%
Other Consumer-Oriented Products	190	180	NA	1	1	NA	0.24%	0.30%	0%
FISH & SEAFOOD PRODUCTS	57	59	NA	0	1	NA	0%	0.10%	0%
Salmon	6	6	NA	0	0	NA	0%	0%	0%
Surimi	1	1	NA	0	0	NA	0%	0%	0%
Crustaceans	17	17	NA	0	1	NA	0%	0.35%	0%
Groundfish & Flatfish	11	12	NA	0	0	NA	0%	0%	0%
Molluscs	4	4	NA	0	0	NA	0%	0%	0%
Other Fishery Products	19	20	NA	0	0	NA	0%	0%	0%
AGRICULTURAL PRODUCTS TOTAL	851	815	NA	15	14	NA	2%	2%	0%
AGRICULTURAL, FISH & FORESTRY TOTAL	1,032	978	NA	15	14	NA	1%	1%	0%
Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office									

Section IV. Best Product Prospects

A. Products Present in the Market Which have Good Sales Potential

* Seafood
* Nuts
* Fruit Juice (citrus), concentrate and regular
* Fresh Fruit and Vegetables
* Wine

B. Products Not Present in Significant Quantities but Which Have Good Sales Potential

* Dried Fruits (separately packaged to complement breakfast cereals and dairy products)
* Cherries and Berries
* Specialty Food Preparations
* American "Chef" Convenience Foods and Ready Meals
* Kosher and Halal Foods
* Special Honey Products (e.g. sticks)

C. Products Not Present Because They Face Significant Barriers

* Red Meat and Meat Preparations (hormone ban)
* Poultry (sanitary procedures)
* All GMO-derived food products (moratorium on GMO's)

Section V. Contacts for Further Information

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HIRSCH & CO - GOURMET HOUSE - WILD RICE
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” For Lists of Importers by Specific Product Contact:

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