

How the Market Works

Belgium is a small banana market but per capita consumption is equal to the EC average. The market is characterised by close relations between Belgian and French importers, and France is a major supplier of most of the imported fresh produce. Many Belgian traders purchase their daily requirements in the wholesale market of Rungis, Paris, which is well connected by road.

However, most bananas consumed in Belgium are imported through Antwerp or Rotterdam. Antwerp is a major fresh produce port and received bananas from Latin America which are re-exported to other northern European markets, although as road transport costs increase the ports of Rotterdam, Bremerhaven and Hamburg become increasingly attractive because of their proximity to centres of consumption.

Because the European Commission is headquartered in Brussels and Antwerp is a major fresh produce port, second only to Rotterdam in importance in the EC, many major importers have their European headquarters in Belgium. Where major importers do not use Rotterdam as their central control port, they normally use Antwerp. For instance, Chiquita Brands International has its International Co-ordination Centre in Antwerp. Thus, even though Belgium is not a major banana market with opportunities for Commonwealth banana producers the key importers in Antwerp and Brussels are important contacts in the European banana trade.

The market is supplied almost exclusively by Dollar bananas from Latin America. Similar trading arrangements to those used to Dollar bananas in other northern European countries apply, with most bananas being imported on a free on rail (FOR) or free on truck (FOT) basis.

Market Requirements

Belgium is a wealthy market which is less quality conscious than Germany or France but still demands quality fruit in clusters, preferably with some form of fruit label to distinguish the fruit from other brands.

Like other northern European markets, Belgian banana importers place a high priority on fruit quality and are prepared to pay a premium to producers who consistently supply high quality bananas.

- Most importers insist that fruit is packed in clusters of 4 to 5 bananas.
- Minimum finger length of 20 cm and most bananas sold are in the 23-26 cm finger length range.

Small fruit shops and open air markets are more common in Belgium than other northern European countries and thus carton graphics can be important in

developing a marketing strategy. Growers should develop a relationship with a strong importer by proving that reliable supplies of consistently high quality fruit can be provided at competitive prices. Working with an established importer/marketeer makes it much easier for growers to deal with large retailers who are more likely to support a new source of bananas if it is backed by a respected importer/marketeer.

Target market niches should be selected with the importer and a strategy jointly developed for entering the market. Tasks for implementing the plan should be assigned to producers, importers/marketeers and retailers with clear terms of reference, deadlines and budgets. In this way, growers can meet their commitments to a new marketing programme and demonstrate their reliability.

Packaging for the Market

- 18 kilogram telescopic, corrugated carton of stapled construction with single corrugated base and lid with a single corrugated base insert (fitting) is used by most producers exporting bananas to Belgium. This carton size is preferred in the market because of handling efficiency, but presents problems for field packed fruit because of its weight.
- Labelling statements in French are preferred but English is acceptable. Palletised and containerised fruit handling systems are increasingly common in Antwerp and producers considering sending fruit to Antwerp should ensure that their cartons meet packaging requirements.
- Graphic design on cartons is important in Belgium because of the dominance of smaller fruit shops and open air markets.

Promotion in the Market

The Belgian banana market is price and quality conscious and prefers fruit of good quality which is highly competitive in terms of price relative to other fruits. Brands with a reputation for consistent quality that are competitively priced will normally attract a premium in the wholesale market. The use of brand labels, branded hooks for displaying clusters of fruit, and point of sale posters and decals helps establish a desirable product image in Belgium but is less important than in, say, the German banana market.

As with other mature markets, it is also possible to supply fruit to importers with established brands and sell fruit under existing brands so long as fruit consistently meets that brand's standards.

Key Market Contacts

The enterprises included in this list, which is not exhaustive, are key traders in the Belgian market. However, it should be noted that all exporters should carefully assess the capability of any company with whom they hope to trade, since the Commonwealth Secretariat takes no responsibility for the financial standing of these enterprises.

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BELGIUM & LUXEMBOURG
BANANA IMPORTS FROM NON-EC SOURCES
'000 TONNES

	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
COLOMBIA	9	20	10	17	24	27	47	71	85	83
COSTA RICA	6	18	12	15	17	13	24	20	36	49
ECUADOR	13	10	14	14	14	16	24	15	27	36
GUATEMALA	0.3	0.2	0	0.1	2	0.4	7	3	2	3
HONDURAS	10	8	17	11	16	21	11	7	11	23
IVORY COAST	0	0	0	0	0.1	0	0	0.1	0.1	4
NICARAGUA	0	0	2	13	21	10	10	5	3	1
PANAMA	32	24	23	21	26	29	32	40	38	96
TOTAL	70.3	80.2	78	91.1	120.1	116.4	155	161.1	202.1	295

Source: EC NIMEX

BELGIUM & LUXEMBOURG
VALUE OF BANANA IMPORTS FROM NON-EC SOURCES
'000 ECU

	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
COLOMBIA	3,946	9,478	4,891	6,646	9,679	9,675	16,898	23,819	34,432	31,160
COSTA RICA	2,958	4,474	6,356	6,659	7,582	5,084	8,584	11,520	12,501	18,742
ECUADOR	5,970	5,095	8,142	6,561	6,293	6,527	8,152	6,029	11,435	12,873
GUATEMALA	115	65	0	7	819	108	2,550	1,038	646	807
HONDURAS	4,642	4,351	9,689	5,244	7,864	9,828	4,615	3,140	5,785	10,025
IVORY COAST	0	0	0	0	37	0	0	18	69	1,824
NICARAGUA	0	0	851	5,103	3,139	2,962	2,915	1,849	1,427	256
PANAMA	15,837	15,357	12,698	10,144	12,379	12,789	12,209	17,176	17,781	31,422
TOTAL	33,468	38,820	42,627	40,364	47,792	46,973	55,923	64,589	84,076	107,109

Source: EC NIMEX