

Belgium: Fresh fruit and vegetables by far the most important organic category

In Belgium, the consumption of fresh organic food and beverages increased by 6% in 2017. In Flanders, this increase was as much as 11%. Fruit, vegetables and potatoes continue to receive the most interest. These represent 40% of spending in the organic market. The number of people who buy organic products at least weekly also increased in 2017. These numbers increased across all organic product categories except meat. In descending order, people buy the most organic vegetables, dairy products, fruit, bread, eggs, potatoes, and meat. You find organic products everywhere. At farms, in the discount supermarkets, in the regular supermarkets, in the delicatessen.

It is not for nothing that 90% of Belgians buy an organic product at least once a year. The market share of fresh organic foodstuffs climbed from 3 to 3,2%. Farm stalls and farmers markets have the most organic products in their assortment. Here, one in five products is organic. The traditional supermarkets remain the most important purchasing channel for organic products.

These results were recorded by GfK Belgium at the behest of VLAM. For this, the home use purchases of 5,000 Belgian households were continuously monitored.

Spending on organic products climbs

Between 2008 and 2017 the expenditure on fresh organic foodstuffs and beverages more than doubled in Belgium. In 2017, there was an increase of 11% in Flanders and of 8% in Wallonia, compared to 2016. Spending in Brussels fell by 7% in 2017, despite this region realising tripled spending in the organic sector between 2008 en 2017.

'Potatoes, fruit and vegetables are by far the most significant organic category

Forty percent of spending in the organic sector consists of buying fresh fruit and vegetables. The 'meat, fish and egg' category accounts for less than a quarter of spending in the organic sector. The spending in this category is also shrinking. Dairy's share fluctuates at around 20% and grain products at the 12%-mark. Finally, wine and beer are good for 4% of the assortment.

9 out of 10 Belgians buy organic

Organic products are part of people's regular diet. Nine out of ten Belgians buy at least one organic product per year. Spending in the organic sector is realised at 60% because of families that buy these

products on at least a weekly basis. This group comprises 11% of buyers. The market share of these frequent buyers is increasing.

There are significant differences in buyer numbers within the product groups. In decreasing order, we find most people buy organic vegetables, dairy products, fruit, bread, eggs, potatoes, and meat. The number of buyers was stable last year, with some light growth across all the categories. The meat category, which attracted many new buyers in the 2005 to 2010 period, did not fare as well after that.

Organic market share climbs and varies considerably from product to product

Organic fresh produce's market share remains limited in Belgium. It is, however, increasing steadily and now stands at 3.2%. The organic market share varies significantly from product to product. With 26%, meat substitutes have the biggest share of the market. Another category with a high organic share is 'eggs'. The market share for organic eggs was 14,5% last year. The fresh fruit and vegetable category has a higher organic share than average, namely 7% for vegetables, almost 6% for potatoes, and 4,4% for fruit. This makes potatoes, along with eggs, the biggest long-term climbers. Dairy has a 3,2% average share. Bread, poultry, and meat are below average. Meat products bring up the rear with a share of 1% in this market.

Well-off families and two-income households: long-term growers

Single people, old and young, have with about 4,5%, the highest organic market share. In absolute figures, wealthy families with children and well-off pensioners are the most important group of spenders in the organic sector. Together, they are responsible for half of these spendings. When it comes to organic market share in the 2008 to 2017 period, we find the most substantial increase in wealthy families with children and two-income families.

Limited-income households with children have the lowest organic market share, namely 1,4%. This population group has, however, tripled its organic market share since 2008. The reason for this is the introduction and expansion of many organic products in Hard Discount. Pensioners and couples with one breadwinner have an average moderately growing share in this market.

Organic spending per capita is in a rising line

People spend the most money on organic dairy and vegetables. Then it is fruit, meat/poultry and organic bread and baked goods. Eggs, potatoes and meat products follow at a distance. Organic meat substitutes and organic dairy substitutes bring up the rear.

DIS 1 is the most important organic channel, but Hard Discount is the biggest grower.

Farm stalls and farmers markets have a higher percentage of organic products in their assortment than average. One in five products in these channels are organic. In the Hard Discount sector, there is, on average, the least number of organic products (1,4%). The most important purchasing channel for organic products remains the traditional supermarket (Dis 1).

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