Belgian exports

April 2015
1. KEY FACTS

2. INTRODUCTION

3. SIZE OF EXPORTS

4. MAIN PRODUCTS

5. MAIN PARTNERS

6. SUCCESSFUL EXPORT SECTORS
   6.1 Chemicals       6.7 Plastics
   6.2 Food           6.8 ICT
   6.3 Biotech        6.9 Transport & logistics
   6.4 Automotive     6.10 Energy & environment
   6.5 Pharma         6.11 Waste & recycling
   6.6 Aerospace      6.12 Others

7. SOURCES

8. CONTACT
1. KEY FACTS

- Head of state: HM King Philippe
- Government: Federal parliamentary democracy & constitutional monarchy
- Capital: Brussels
- Population: 11 million
- Languages: Dutch, French, German
- Surface: 30,528 km²
- Nominal GDP: EUR 402 Bn
- Growth: 1,0 %
- Inflation: 0,5 %
- Public debt: 104,7 % of GDP
- Unemployment rate: 8,5 %

Did you know that:
- A Belgian founded New York City?
- French-speaking Belgium is the world's biggest producer of comics per capita?
- The first printed newspapers in the world were published in Antwerp?
2. INTRODUCTION

- In its quality as an export country, Belgium exports its products to destinations worldwide. This means that when you visit exotic locations it is not unusual to find Belgian products there, and you probably use a Belgian product without realising it and at some point no doubt have had a product in your hands that was invented in Belgium.

- Belgium boasts an impressive range of products. The products that account for the lion's share of Belgian exports are consumer and intermediate goods such as machinery, equipment and chemical products, and the list goes on with cars assembled in Belgium, plastics and pharmaceutical, organic chemical and metal products.

3. SIZE OF EXPORTS

- Belgium is the 13th world exporter for goods
- Belgium is the 12th world exporter for services
- Belgian exports amount to > 85% of the GDP
4. MAIN PRODUCTS

BELGIAN FOREIGN TRADE - PRODUCTS
January - December 2014 (January - December 2013)

EXPORTS

<table>
<thead>
<tr>
<th>Product Type</th>
<th>Share</th>
<th>Value (EUR)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mineral Products</td>
<td>12.1%</td>
<td>42,679.8 million</td>
</tr>
<tr>
<td>Chemical &amp; Products</td>
<td>23.5%</td>
<td>82,999.8 million</td>
</tr>
<tr>
<td>Machinery &amp; Equipment</td>
<td>10.2%</td>
<td>35,980.1 million</td>
</tr>
</tbody>
</table>
4. MAIN PRODUCTS

Sectoral breakdown of Belgian exports (2014)

- Chemical products: 23.5%
- Mineral products: 3.2%
- Machinery and equipment: 12.1%
- Transport equipment: 10.1%
- Plastics: 8.1%
- Base metals: 7.1%
- Precious metals and stones: 6.0%
- Foodstuffs: 5.0%
- Textiles: 4.9%
- Optical instruments: 3.3%
- Vegetable products: 3.2%
- Animal products: 2.0%
- Other: 3.0%
• **Belgium, 1st exporter worldwide of:**
  - Dolomite
  - Felt carpets
  - Frozen vegetables
  - Oxygenated water
  - Margarine
  - Anti-frost liquid
  - Master alloys of copper
  - ...

![Images of export products](images)
5. MAIN PARTNERS

BELGIAN FOREIGN TRADE - PARTNERS
January - December 2014 (January - December 2013)

**EUROPE**
- TOTAL EXPORTS: EUR 267,584.0 million (EUR 267,554.5 million)
- SHARE: 75.8%

**ASIA**
- TOTAL EXPORTS: EUR 38,552.1 million (EUR 37,581.9 million)
- SHARE: 10.9%

**AMERICA**
- TOTAL EXPORTS: EUR 27,828.2 million (EUR 25,071.3 million)
- SHARE: 7.9%

**EXPORTS**
- TOTAL EXPORTS: EUR 353,214.6 million (EUR 352,955.7 million)

**IMPORTS**
- TOTAL IMPORTS: EUR 339,391.1 million (EUR 340,092.9 million)

Click [here](#) for the latest version
Share of exports per continent (2014)
BELGIUM’S TOP 3 CUSTOMERS
(share 44.3% - 2014)

- Germany, 16.7%
- France, 15.6%
- Netherlands, 11.9%

> Click here for more information and access the top 20
Belgium’s top 10 customers (2014)
6. SUCCESSFUL EXPORT SECTORS

- Chemicals
- Food
- Biotech
- Automotive
- Pharma
- Aerospace
- Plastics
- ICT
- Transport & logistics
- Energy & environment
- Waste & recycling
- ...

belgian foreign trade agency
6. SUCCESSFUL EXPORT SECTORS
6.1 Chemicals

- Long tradition of world renowned scientists: Ernest Solvay, Christian de Duve, Leo Bakeland...
- Number 1 chemical country in the world on a per capita basis
- 13 of the top 20 chemical companies have production sites in Belgium (BASF, Exxon Mobil, Dow Chemical...)
- Share of the chemical industry in Belgium is bigger than in Germany
- The port of Antwerp hosts the largest chemical industry in Europe
- Belgium hosts the 2nd world cluster for chemicals
- R&D expenditures increase continuously
- Strong collaboration between the industry, schools and universities
6. SUCCESSFUL EXPORT SECTORS
6.1 Chemicals

- Some famous Belgian names:
  - NANOCYL (leading supplier of Carbon Nanotubes Technology – based products)
  - DERBIGUM (specialist in highly reflective roofing membrane)
  - RECTICEL (worldwide leader in sustainable sealants, PU foams and adhesives)
  - ...

- To know more about Belgian chemicals:
  - Essenscia, Belgian federation for Chemistry and Life Sciences Industry (www.essenscia.be)
6. SUCCESSFUL EXPORT SECTORS

6.2 Food

- « The way to Belgium’s heart is through its stomach »:
  - Belgian is a ‘great food country’ in the heart of Europe
  - Belgian cuisine is one of the most praised in Europe
  - Belgium benefits from a gastronomic and culinary heritage

- Belgian food stands for quality, innovation and diversity:
  - Optimal efficiency
  - Products with superior quality
  - Innate sense of innovation
  - Belgium boasts a wide range of highly successful companies
  - Companies looking for continuously better nutrition for better health with a variety of tastes and for different cultures
  - Well-established techniques of processing and packaging foods

- Belgium is a test market for major brands:
  - Multinationals established since long (Coca-Cola, Nestlé, Kraft Foods, Unilever, Ferrero, Danone...) with R&D centres and production sites

- 50% of the Belgian production is destined for foreign markets:
  - Most exports for our neighbours but the share of major exports increases

- 2 flagships products, ambassadors for the Belgian art of living: chocolate and beer
6. SUCCESSFUL EXPORT SECTORS

6.2 Food

- Belgian chocolate, a national treasure
  - Belgium is the country of chocolate: Belgians are passionate about it
  - Available in many forms: bars, ballotins of pralines, topping for cakes or biscuits, moulded figures, etc
  - Biggest exporter of chocolate per number of inhabitants
  - Chocolatiers owe their excellent reputation to the rigorous selection of the best cocoa beans
  - Long tradition of mixing types of bean to produce chocolates with a unique flavour
  - Special care when roasting and milling the cocoa
  - Famous brands: CALLEBAUT, GODIVA, LEONIDAS, GALLER, BRUYERRE, NEUHAUS, PIERRE MARCOLINI, NEWTREE

- Belgium, a beer heaven
  - Enormous diversity in flavours and colours
  - Headquarters of the biggest brewer worldwide: AB-INBEV
  - Not fewer than 15 breweries offering more than 750 types of beers
  - Famous brands: JUPILER, STELLA ARTOIS, HOEGAARDEN, LEFFE, DUVEL, PALM, ...

- And also:
  - Belgian fries: success based on top-quality raw materials: potato variety « bintje » (cultivated in the rich earth of West Belgium)
  - Belgian products for bakers (flours, yeasts, etc): PURATOS
  - Belgian biscuits: JULES DESTROOPER, DELACRE, DESOBRY, LOTUS BAKERIES (speculoos)
  - Belgian waffles: Liege waffle, Brussels waffle became export products
  - Belgian sauces, herbs and spices
• To know more about Belgian food:
  - FEVIA, federation of food companies in Belgium ([www.fevia.be](http://www.fevia.be))
  - VLAM, Flanders' Agricultural Marketing Board ([www.vlam.be](http://www.vlam.be))
  - Wagralim, Walloon agro-industry cluster ([www.wagralim.be](http://www.wagralim.be))
  - Flanders’ Food ([www.flandersfood.com](http://www.flandersfood.com))
  - Publication « Belgian Innovative Food Solutions » (to be published in October 2015)
6. SUCCESSFUL EXPORT SECTORS
6.3 Biotech

- Over 300 biotech companies operating in Belgium
- 16% of turnover and 10% of R&D expenditures in Europe
- Very intense research network comprising universities, companies and organisations
- Belgian innovation system among the best of the world according to OECD
- Supported by dynamic investment funds
- Highest concentration of life-science employees in the world
6. SUCCESSFUL EXPORT SECTORS

6.3 Biotech

• Some famous Belgian names:
  ▪ GALAPAGOS
  ▪ CARDIO3 BIOSCIENCES
  ▪ EUROGENTEC
  ▪ THROMBOGENICS
  ▪ DELPHI GENETICS
  ▪ ...

• To know more about Belgian biotech:
  ▪ Bio.Be, the federation of Belgian companies active in the biosciences, part of essenscia (http://www.essenscia.be/en/bio.be)
6. SUCCESSFUL EXPORT SECTORS

6.4 Automotive

- Belgium remains a major player in automotive assembly despite the crisis affecting the sector
- Highly qualified workforce with an undeniable track record of high productivity
- Parts and components are tested in research centres where the potential of new technologies is analysed
- Turning to high technology (hybrid technology, new materials...)
- 6th largest automaker in Western Europe
- Strong potential for growth in both the volume and high-end segments
- Development of specialist technical skills
- Over 90% of Belgian production is dedicated to export
Some famous Belgian names:
- VAN HOOL (bus manufacturer)
- VW (dominant manufacturer on the Belgian new car sales market)
- ...

To know more about Belgian cars:
- FEBIAC, the Belgian motor car and motorcycle association ([www.febiac.be](http://www.febiac.be))
6. SUCCESSFUL EXPORT SECTORS
6.5 Pharma

- World leader in the pharmaceutical industry
- Largest number of medicines in development per capita in the world
- Highest number of phase 1 clinical trials in Europe per capita
- 2nd largest pharmaceutical export country in the world in absolute figures
- 7th largest investor in the world in biopharmaceutical R&D
• Some famous Belgian names:
  ▪ GLAXOSMITHKLINE BIOLOGICALS
  ▪ UCB
  ▪ MITHRA PHARMACEUTICALS
  ▪ TILMAN
  ▪ ...

• To know more about Belgian pharmaceuticals:
  ▪ Pharma.be, Belgian association of the pharmaceuticals industry (www.pharma.be)
6. SUCCESSFUL EXPORT SECTORS

6.6 Aerospace

- Belgian industry plays a prominent role in the aerospace sector
- Many aircraft and spacecraft bear the stamp of Belgian know-how
- Belgium has an extensive range of infrastructure, including:
  - Several international airports
  - European Space agency satellite tracking station at Redu
  - Space telecommunications centre at Lessive
6. SUCCESSFUL EXPORT SECTORS

6.6 Aerospace

- Some famous Belgian names:
  - NEWTECH
  - THALES
  - SABCA
  - ASCO
  - ...

- To know more Belgian manufacturers active in the space field:
  - BELSPO, Belgian Federal Science Policy Office
6. SUCCESSFUL EXPORT SECTORS

6.7 Plastics

- Global leader in per capita plastics processing and production
- Belgium is among EU elite when it comes to the re-use of plastic waste: 30% is recycled and 66% is incinerated in order to produce energy
- 80% of plastics and rubber processors in Belgium are innovative companies (highest in the EU after Germany)
6. SUCCESSFUL EXPORT SECTORS

6.7 Plastics

- Some famous Belgian name:
  - SABERT (food presentation and packaging solutions)
  - NMC (leader in synthetic foams)
  - SOLVAY (European leader in the PVC sector)
  - ORFIT (dedicated to the medical industry)
  - ...

- To know more about Belgian plastics:
  - Federplast.be, Belgian association of manufacturers of plastics and rubber ([http://www.federplast.be/](http://www.federplast.be/))
6. SUCCESSFUL EXPORT SECTORS

6.8 ICT

- The latest IT Industry Competitiveness Index 2011 ranked Belgium in 22nd place worldwide.
- In the Global Information Technology Report 2014 (World Economic Forum), Belgium ranked:
  - 12th for “Availability of the latest technologies”
  - 3rd for “Quality of math and science education”
  - 10th for “Capacity for innovation”
- In Brussels, the software market has become one of the most promising technology sectors thanks to its concentration of high-level academic institutions and competence centres for software development technologies.
- Most of the Brussels-based software companies offer world-class solutions that are sold all over Europe and beyond.
- Technological workforce and ICT infrastructures have an excellent reputation.
- 10 computer sciences faculties, with some of them among the oldest in Europe (Namur, Leuven).
- Presence of world leaders combined with several national flagships.
- Partnership with Chinese equipment suppliers (Huawei, ZTE).
- Quality of the network infrastructure.
- Significant investments of Google (high-tech data centre) and Microsoft (Microsoft Innovative Centre).
6. SUCCESSFUL EXPORT SECTORS
6.8 ICT

• Some famous Belgian names:
  - Banking software (BSB, CALLATAY & WOUTERS)
  - Optical character recognition (IRIS)
  - Medical IT (AGFA HEALTHCARE)
  - Security (VASCO)
  - Payments (OGONE, ATOS WORLDLINE)
  - Imaging (BARCO, EVS)
  - ...

• To know more Belgian ICT products and services:
  - Fedict, Federal Public Service for Information and Communication Technology (www.fedict.belgium.be/)
  - Agoria, Belgian federation for the Technology Industry (www.agoria.be)
  - eTIC
  - AWT
  - Software in Brussels (cluster)
6. SUCCESSFUL EXPORT SECTORS
6.9 Transport & logistics

- 3rd most attractive country in the world for logistics after Germany and the Netherlands (source: Logistics Performance Index, World Bank, 2014)
- 6 Belgian provinces included in the top 10 of European logistical regions (source: Cushman & Wakefield 2013)

- Well-developed multimodal transport network
- Dense network of motorways and rail infrastructure connected to the neighboring countries (France, Netherlands, Germany, Luxemburg, UK)
- 5 strategic ports (Antwerp, Ghent, Zeebrugge, Liege, Ostend)
- 3 cargo airports (Brussels, Liege, Ostend)
6. SUCCESSFUL EXPORT SECTORS
6.9 Transport & logistics

- Central location in the Western European pipeline network
- Many storage terminals and distribution platform
- Worldclass telecommunication and Internet infrastructures
- Numerous distribution centres, taking advantage of the low cost and short distance to Europe’s major markets

To know more about Belgian transport and logistics services:
- Logistics Belgium ([www.logisticsbelgium.com](http://www.logisticsbelgium.com))
• Belgium is home to many companies that are innovators in **renewable energy**
  - 21% of the energy consumption in Belgium is produced from renewable sources
  - Belgium is ranked 13\textsuperscript{th} (5\textsuperscript{th} in EU) in the Renewable Energy Country Attractiveness Index of EY
    - **Biomass**
      - Belgium is a pioneer of the conversion of coal-fired power stations to co-combustion or 100% biomass combustion (replacing coal with pellets of wood)
    - **Wind**
      - Belgium is in the top 5 for wind turbines
      - Belgium is a leader in offshore expertise and 3\textsuperscript{rd} country in Europe in terms of installed capacity
    - **Solar**
      - One house out of 13 is equipped with photovoltaic panels (highest rate in the world)

• Belgium is home to several companies that have evolved into world specialists in improving **energy efficiency** (building materials, building fittings, energy generation, etc.)

• Belgian environmental technology offers a wide range of innovative solutions in the field of **air purification**
6. SUCCESSFUL EXPORT SECTORS

6.10 Energy & environment

- Some famous Belgian names:
  - CMI ENERGY
  - C-POWER
  - TRACTEBEL ENGINEERING
  - 3E
  - ...

- To know more about Belgian energy & environment services:
  - Flanders Cleantech Association, the Flemish cleantech cluster (www.fca.be)
  - Greenwin, an innovation Walloon cluster dedicated to green technologies (www.greenwin.be)
  - APERe, association for the promotion of renewable energies (www.apere.org)
6. SUCCESSFUL EXPORT SECTORS
6.11 Waste & recycling

- Belgium is a model student and a leader regarding the processing of waste streams:
  - Municipal waste
    - 57% recycled (vs 42% for the EU-28 average)
    - Excellent system for selective collection at source
  - Industrial waste
    - Very low landfill rate: 11% => 3rd position in EU
  - Packaging waste
    - Recycling percentage: 80% => 1st position in EU
    - Excellent system of take-back obligation
  - Waste electrical and electronic equipment (WEEE)
    - 10 kg collected by inhabitant per year => 1st position in EU

- Belgium is a pioneer in landfill solutions thanks to its expertise in environmentally-friendly design and long-term management

- Belgium has built up know-how in sustainable soil remediation techniques
6. SUCCESSFUL EXPORT SECTORS
6.11 Waste & recycling

- Some famous Belgian names:
  - REMO
  - DUFOUR
  - INDAVER
  - UMICORE
  - ...

- To know more about Belgian waste & recycling solutions:
  - FEBEM-FEGE, the federation of Belgian waste management and environmental companies ([www.febem-fege.be](http://www.febem-fege.be))
  - COBEREC, the confederation of the Belgian recovery sector ([www.coberec.be](http://www.coberec.be))
6. SUCCESSFUL EXPORT SECTORS

6.12 Others

- Other activities:
  - Metals
  - Manufacturing industries
  - Design
  - Cinema & media
  - Building
  - Architecture
  - Consultancy
  - ...

belgian foreign trade agency
Other Belgian champions:

- AMOS: astronomical telescopes
- CARTAMUNDI: play cards
- SALUC: billiard bowls
- SCHREDER: lighting solutions
- WOW TECHNOLOGY: wave balls
- MAGOTTEAUX: differentiated solutions against wear
- LHOIST: lime
- DEME, JAN DE NUL: dredging
- ...
7. SOURCES

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- Made In Belgium 29th edition 2013
- Business.belgium.be (business.belgium.be/en)
- The Economist Intelligence Unit (www.eiu.com)
- Trends Tendances (www.trends.be)
- OECD (www.oecd.org)
8. CONTACT

- Federal Public Service Foreign Affairs, Foreign Trade and Development Cooperation
- Brussels Invest & Export
- Flanders Investment & Trade
- Wallonia Export-Investment Agency
- Belgian Foreign Trade Agency