



EMCC case studies

The food cluster in the Flanders region

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Introduction

This report profiles the food and beverage industry cluster in Flanders, Belgium. Flanders is one of the three Belgian regions and covers almost half of the Belgian territory and the entire Belgian coastline. The region's food industry has a long history and tradition, but is currently undergoing intense restructuring. Recent initiatives are aimed at fuelling innovation in the sector to keep it competitive in global markets.

The Flanders region

Table 1: *General statistics on the Flanders region*

Area	13,522 km ²
Population	6,043,161 (2005)
Employed, total	1,962,537 (2003)
Employed in secondary sector	538,117 (2003)
Employed in food sector *	63,000 (2006)
Unemployment rate	8.52 % (2005)
GDP per capita, Euro	24478.1 (2002)
R&D, % of GDP	2.32 (2000)

Sources: APS (*Flanders region department for administrative planning and statistics*).

Data available at http://aps.vlaanderen.be/statistiek/cijfers/stat_cijfers_economie.htm;

Profiel Vlaanderen – statistical profile of Flanders region (in Flemish).

Available at <http://aps.vlaanderen.be/statistiek/publicaties/pdf/profiel/Profiel2003.pdf>

* Estimate by Federation of the Belgian food industry (FEVIA), Flanders based on data from 2002 and information about annual net growth.

Flanders covers 44.8% of Belgium and is home to some 60% of the total Belgian population. The region has most of the country's industry and workforce and also generates most of the national trade, i.e. the Flemish gross regional product provides 60% of the national GDP.

The region has many geographical advantages, placed as it is on the North Sea coast and close to a number of North European capitals and economic and political centres such as Frankfurt, Paris, and London. Furthermore, Brussels, although a region in its own right, is geographically within the Flanders region, giving the Flemish industry easy access to European policy formation and to information on European developments.

Because the transportation infrastructure by sea, rail, and road is well developed, the region's industry has easy access to markets and suppliers. Consequently Flanders, and particularly the areas near the big ports in Antwerp, Ghent, and (earlier) Bruges, has had a strong industrial presence ever since the Industrial Revolution. However, by 2003 industry accounted for only 27% of regional employment. Most (70%) of those employed work in the service sector.

The Flemish food industry

The Flemish food industry, the largest part of the Belgian food industry, has a very long history. Mr. Paul Verhaeghe, former president of FEVIA, the Belgian federation of food industries, summed up the historical position of the industry in the Belgian economy and the public image in an interview for this study:

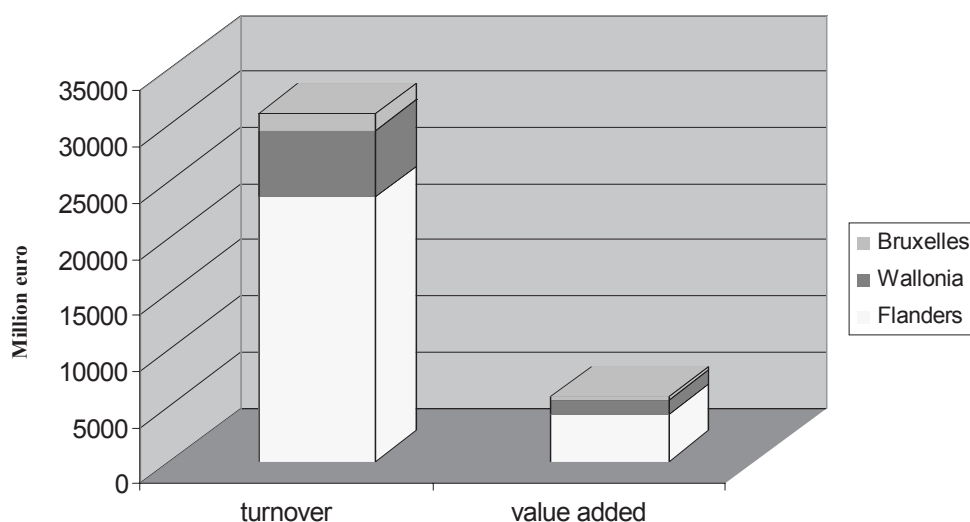
- 1945 – 1965: In this period, food was synonymous with agriculture. The role of the food industry was to preserve agricultural produce.
- 1965 – 1985: The events of May 1968 sparked an awareness of environmental concerns and public scrutiny turned to food. Multinational companies were seen as an American, capitalist (and therefore suspect), phenomenon, and public interest turned towards food additives, e.g. colouring, flavourings, etc. These developments led to the first Belgian food law, which was passed in 1977.
- 1985 – 2005: During this period, the most important driver for the food industry was the Single Market. Food became a topic for legislation. Common European regulation of the food sector became more prominent. With increasing trade, food safety became more important. Control bodies were set up at national level, and at the European level the European Food Safety Authority(EFSA) was created in 2002. EFSA has had, and will continue to have, great influence on Belgian food manufacturing.

The Flemish food industry does not define itself as a cluster, but from a purely geographical viewpoint, Belgian food industrial operations are clustered in Flanders and more particularly around the big ports of Antwerp and Ghent. About 75% of Belgium's 6,334 food enterprises are in Flanders and about one third of these, or 1,600 enterprises, are near Antwerp.

Flemish Food Industry – Facts and Figures

Figure 1 illustrates the Flemish share in the total turnover and value added of the Belgian food industry compared to the other two Belgian regions, Wallonia and Brussels.

Figure 1: *Key economic figures for the Belgian food industry by region.*

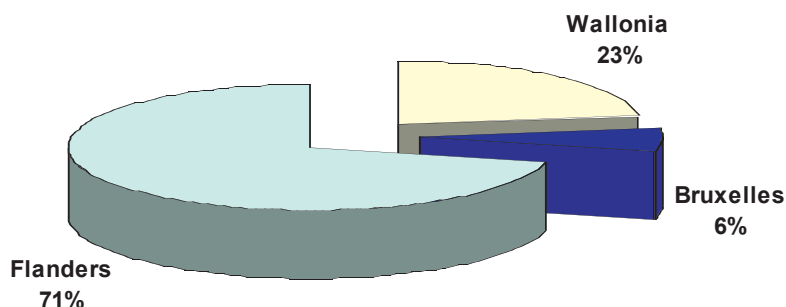


Source: FEVIA. Data for Belgium and Flanders are from 2004, for Wallonia from 2003.

The food industry accounts for 15.9% of industrial turnover in Flanders, just a little more than the figure for Belgium as a whole, which is 15.5%. However, as Figure 1 indicates, 76% of the total turnover of the Belgian food industry is Flemish.

The Belgian food industry employs 87,900 workers. Figure 2 shows the distribution of these among the regions.

Figure 2: *Employment in the Belgian food sector by region, 2005*



Source: FEVIA. Estimates on the basis of data from 2004 (Belgium) and 2002 (the regions)

According to FEVIA, the growth rate in the food industry has remained steady at about 2% per year, but in 2005 it appeared to slow a little. Expectations are that it will catch up in future.

Historically, the Flanders region has been attractive for the food industry for the same reasons it was attractive to other industries: central location in (Western) Europe and accessibility. The geographical element is illustrated by the fact that after World War II, the supply lines for grain from the US and Canada to all of Europe went through Antwerp and Ghent.

Apart from the favourable location, Flanders has good natural conditions for cattle breeding. The meat and dairy industries grew out of agriculture. Indeed, until recently Belgian authorities do not appear to have considered the food industry an economic sector in its own right. Judging from the lack of statistical data and targeted economic analyses of the sector, it was viewed as a sub-sector of agriculture. This implies that food industry policy was derived from agricultural policy which, according to FEVIA representatives, was not always to the advantage of the food industry.

With respect to research and development (R&D), Flanders has many research institutions and establishments for higher education. Some 26% of the Flemish population has received higher education and the universities of Leuven and Ghent are ranked among the 10 best research centres in the world (*The Scientist*, 2003). Spending on R&D in Belgium was 2.33% of GDP in 2005. In Flanders, business accounted for 73% of R&D spending while the rest was by universities and other public research institutions.

Life sciences are among the key fields in university research in the region, and insights from this field are often relevant to the food sector. Both the Catholic University of Leuven and the University of Ghent have departments concerned with food technology, microbial technology, and nutrition.

Without exception, all those interviewed point to the Belgian tradition of good food as important. Belgians are gourmet minded and consider food important. The CEO of Algist Bruggeman, Mr. Casier, sums it up as follows: 'We have something with food!'

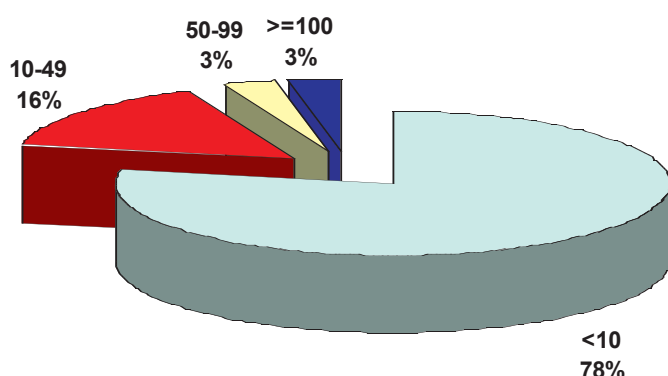
The share of Belgians' income spent on food, although decreasing lately, is still above average for Northern Europe. The existence of a discerning home market no doubt plays a role in developing a diverse food industry because it offers a base from which to develop new foods. The interviewees also point out that the Belgian love of food and consequent emphasis on quality means that the rest of the world considers Belgian food high quality, and that 'Belgian' in this sense is a national brand for all Belgian consumer food products.

However, the national brand might also conflict with the Flanders region's wish to brand itself. At a recent food exhibition, the Flemish exhibitors were told by the Flemish regional government representatives not to display the Belgian flag at their stands. If they wanted to display a flag, it had to be the regional Flemish flag.

Company size and ownership structure

Since industrialisation and until the 1960s and 1970s, the Belgian food industry was dominated by small family owned businesses. The average company size is still very small, as Figure 3 shows. Data on size for the Flemish food industry are not available; Figure 3 shows the distribution for all Belgian companies by number of employees. However, according to FEVIA, the distribution by company size in Flanders is similar to that shown here.

Figure 3: *Percentage of Belgian food companies (2001) by number of employees.*



Source: FEVIA

According to FEVIA, the average company size has not changed much over the years. While most companies are still quite small, the few big ones are responsible for most of the employment in the sector. For example, the 165 companies with more than 100 employees employ 38,883 people, corresponding to 44.7% of all employment in the Belgian food sector.

However, the ownership structure has changed radically. With the advent of the common European market, the multinational food corporations discovered the market possibilities and began a wave of acquisitions. At the time, the food industry did not appear to be very attractive to Belgian institutional investors, who preferred to invest in heavy industry. As a result, big foreign players now control many of the former family owned food businesses, and it is estimated that at least two-thirds of the value added in the food sector in Flanders is under multinational control.

Box 1: *Changes in ownership structure in consumer products – chocolate and biscuits*

Before the 1960s, De Beukelaar (biscuits, one well known trademark is Prinzenrolle/Prince), Callebaut (chocolate) and Cotê d'Or (chocolate) were all family-owned Belgian businesses. All are now owned by corporations with headquarters outside Belgium. Through a series of mergers, the trademarks and production facilities of De Beukelaar are now owned by Danone. Callebaut has merged with the French Barry, and the combined company (which has acquired several other operations) now has headquarters in Switzerland. Cotê d'Or has been acquired by US food giant Kraft Foods.

Source: Interview with Paul Verhaeghe, former chairman of FEVIA, company websites.

Box 2: *Changes in ownership structure in business-to-business – Algist Bruggeman*

Algist Bruggeman is a bakers' yeast producer just outside Ghent. More than 95% of the produced tonnage is sold to bakeries and bread plants. The formerly family owned company grew from alcohol production. In 1988, it was sold to the French multinational Lesaffre Group, the global market leader in yeast.

Source: *Interview with Marc Cahier, CEO, member of the Board of FEVIA.*

Similar developments have taken place in the brewery and the meat industries. However, all these industries still have a network of small and medium sized niche companies producing high-quality products or products responding specifically to local or regional tastes. In the chocolate and meat processing industries, some medium sized companies control the distribution channels by running their own brand shops (butchers, chocolate shops).

The food industry in the region is diverse, albeit with a particularly strong position in chocolate, meat processing, and breweries, but it is also strong in baked goods and baking industry supplies.

Box 3: *Merging family owned companies – Pluma and Ter Beke*

Very recently, the processed meat company Pluma Group (located close to Antwerp) merged with the processed meat division of another family owned company, Ter Beke. The combined company (now the Processed Meat Division of Ter Beke) became market leader in Belgium with a market share of 17%. The market for processed meat has remained stable for 10 years in Belgium, where 90% of processed meat is sold as private label products. The company exports to Benelux, with some (mainly pâté) to the UK.

The combined company has a turnover of around 330 million euro. It comprises five production sites in Belgium and three centres for cutting and packaging processed meats, of which two are in Belgium and one in the Netherlands. Brands include *L'Ardennaise*, *Daniël Coopman*, *Pluma*, and *La Rochette*.

Specialisation

To a certain extent, the companies in the region specialise in certain product categories or sub-sectors. Meat, chocolate, beer, and biscuits and cakes are strong in the regional industry, and within these sub-sectors is a range of companies from very small niche operators to big companies owned by multinational corporations or groups. In some sub-sectors, such as vegetable oil, ownership is wholly in foreign hands. In others, such as coffee, meat, and beer, multinationals own the large companies, while there is a healthy undergrowth of small to medium sized niche producers, some of which control their own distribution channels.

Organisations supporting the food cluster

FEVIA

The food industry in Belgium is organised in FEVIA, the federation of Belgian food industry. The organisation has headquarters in Brussels but is regionalised so that the Flemish food industry has its own organisation competent in regional matters. The main tasks of FEVIA include:

- Collective bargaining with trade unions and advising companies on issues for local negotiation.
- Representing industry views in talks and negotiations with regional and national government.
- Assisting the industry in matters pertaining to food safety and the environment, including information about new legislation in the field.

FEVIA also initiates projects with its members to deal with contemporary issues. A campaign is currently under way to reduce fat and sugar in food products, and the federation has also developed a code of conduct for the industry's handling of packaging materials for recycling. FEVIA works at the level of the whole industry in the regions. It is supplemented at sub-sector level by branch organisations and at local level by local chambers of commerce.

Flanders' FOOD

At the beginning of 2006, FEVIA and a number of its members set up the innovation organisation Flanders' FOOD, with financial support from companies in the region and from the regional government. The organisation was set up to support and enhance innovation in the Flemish food industry by facilitating contacts between research institutions and companies and among companies that can enrich each other's products with specific know-how. The aim is to boost the competitiveness of the regional food industry in a global market in which the regional labour costs are not competitive. This will be achieved by shortening the distance between research and utilisation, thereby increasing the technological content and knowledge intensity of food production in Flanders.

Flanders' FOOD is a membership organisation with companies as members paying a membership fee. The organisation's board is appointed by the members and employs a relatively small secretariat. Flanders' FOOD is intended only to promote innovation and to facilitate knowledge and research results – not to produce these results itself. Therefore, it is quite a slim organisation and focuses its efforts on few topics at a time. Currently the focus is on fat reduction, salt reduction, and microbiological shelf life.

Enhancing innovation involves inviting expert groups (e.g. product development specialists) from different companies to sit together and define roadmaps of common interest. Based on these roadmaps, Flanders' FOOD and the experts formulate priority lists that are then combined into a proposal for the board of directors. Subsequently, the board prepares briefs (terms of reference) that are communicated to the region's technical institutes and universities. The research groups put together proposals and budgets for research projects in response to the briefs and on this basis, the board of Flanders' FOOD decides which knowledge centre will work on which topic and in what budget frame.

Box 4: Examples of projects in Flanders' FOOD.

1. The effects of health-promoting ingredients.

Sub-project 1: Pre- and probiotica

Sub-project 2: Healthy fatty acids

Sub-project 3: Antioxidants

2. Fat reduction/fat replacement

Sub-project 1: Fat reduction/replacement in dough-systems

Sub-project 2: Fat reduction/replacement in meat products

Sub-project 3: Fat reduction/replacement in chocolate products

Sub-project 4: Fat reduction/replacement in emulsified sauces

Sub-project 5: Fat reduction/replacement in whipping cream

Flanders' FOOD will aim to enhance the distribution of knowledge from research institutions and big companies to SMEs in the sector and its utilisation by them. In the words of Eddy Van der Pluym, the current chairman of FEVIA Vlaanderen, Flanders' FOOD wants to become a help desk for small companies by offering them access to available knowledge via a database.

Other activities that are foreseen for Flanders' FOOD include trend analyses (what will consumers want or need in three years?) and a validation centre for companies to validate new ideas by facilitating access to technical expertise, e.g. in organoleptics.

Box 5: Innovation in Vondelmolen – spicy honey cakes

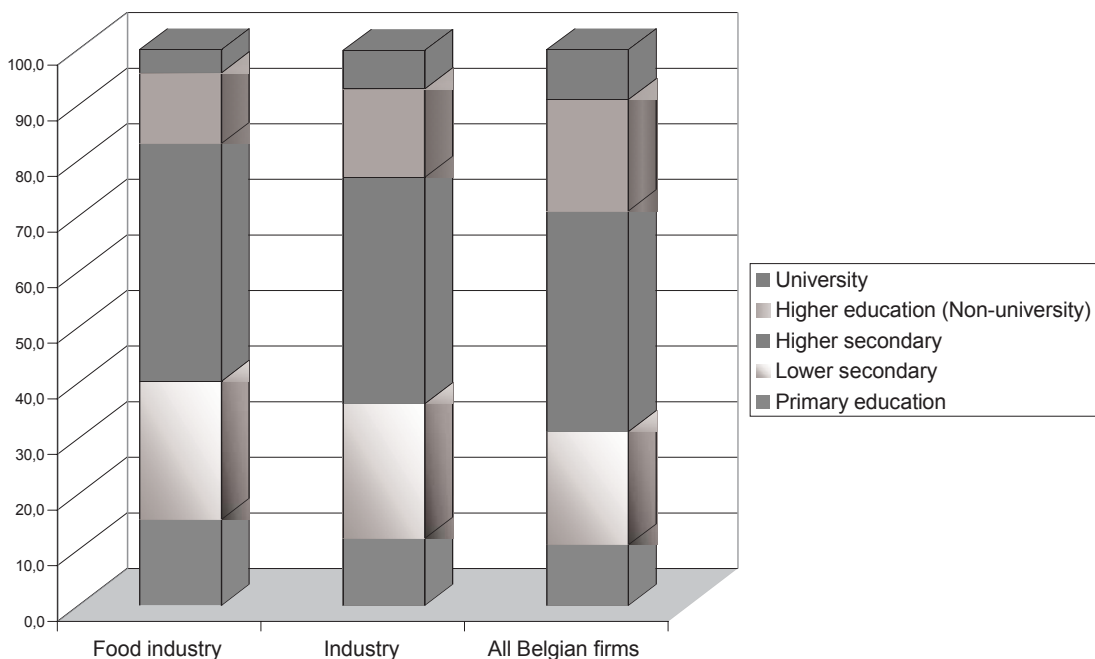
Vondelmolen is a family business with 70 employees located between Ghent, Antwerp, and Brussels. The company, which dates from 1867, produces a range of honey cakes based on regional tradition. Seen with contemporary eyes, these honey cakes have the advantage of containing no fat and being rich in fibre. About 25% of production is under the Vondelmolen brand, the remainder is private label. The company participates in the activities of Flanders' FOOD and has developed variants of the honey cake. Because the honey cake is a regional specialty, the main markets are Belgium, the Netherlands, Northern France, and the northwestern part of Germany. The company aims to develop its products by incorporating new trends into traditional recipes. It recently developed a variant of the cake enriched with calcium and Beneo® (a prebiotic fibre). The management is focused on innovation and the need to change.

The workforce in the Flemish food industry

Education and training

On average, the Belgian food industry workforce has less general education than the workforces in other industrial sectors as well as those in the whole of the economy, as shown in Figure 4.

Figure 4: Education level, percentage of workforce by sector (2002)



Source: IPV (Institute for Training and Education in the Food Industry)

Improvements in the education level of the food sector workforce between 2000 and 2002 was because more workers had completed higher secondary education, while the relative shares of all other categories of education have remained stable or fell. The biggest relative decrease was in the category of employees with only primary education. Therefore, the overall education level in the food sector is increasing but not at the pace of the rest of industry.

Wages in the food industry are also somewhat lower than in other manufacturing, giving work in the sector a somewhat lower status. This means that it can be difficult for food companies to recruit competent staff.

To compensate for this, about 15 years ago the social partners in the food area established IPV, a non-profit organisation responsible for the professional training of food industry workers. The association is jointly administered, meaning that both employers (represented by FEVIA) and trade unions are on the board of management. Its operations are financed by a special contribution of 0.2% of the total salaries and wages paid.

The IPV mission consists of two major parts: training unemployed people and lifelong training of employees up to middle manager level. GMP, HACCP, hygiene, and quality are important areas of training.

The interviewees give IPV's training activities good marks for quality, and participation in training is growing steadily. However, participation is skewed in that the larger the company, the greater chance that employees participate in training.

Higher technical specialists are mainly recruited from the universities. Ghent, Brussels, and Leuven all have courses relating to parts of the food chain, e.g. microbiology, fermentation, etc.

Asked about future skills needs, the interviewed CEOs answered that they expect the supply of highly educated (university) specialists to continue to be sufficient. However, there may soon be problems on the shop floor. Here, less demanding unskilled operations such as maintenance or cleaning tends to be outsourced. Operators, on the other hand, are increasingly required to master conceptual thinking so that they can supervise processes by computer.

Intensified automation is leading to a growing demand for more skilled work; in particular a shortage of electromechanical engineers, electricians, and mechanics is imminent. The food industry risks losing out to the competition for these skills because of its relatively low wages and traditional image of not being attractive to work in. Already electromechanical engineers are being recruited in Poland. In addition, as food safety and traceability issues come increasingly into focus, staff must be more disciplined and quality oriented, meaning that recruiting the right people might get even harder.

For white-collar staff, mastery of IT is a necessity, just as they are required (in Algist Bruggeman) to speak three languages (Dutch, French, and English).

In summary, the Flemish food industry faces the challenge of its need to attract more competent employees while its image and wage levels are not competitive in the regional labour market. The industry and FEVIA are aware of this challenge but no firm solutions were presented during the visit.

The strategic position of the cluster in a global market

Competitive advantages of the industry in the cluster

As already indicated, the food industry in the Flanders region is just at the brink of realising that being part of a cluster might be a way to create competitive advantages for the industry in the global markets.

The region's location and accessibility to the outside world is recognised by all interviewees as very advantageous. In addition, companies serving the business-to-business market mention the proximity to suppliers and customers in the region. For example, Algist Bruggeman, the yeast producer, is close to sugar refineries that deliver molasses, one of the important raw materials, and also immediately next to a port where molasses can be imported from refineries farther away.

The interviewees recognise that historically the links between industry and the research community have been too weak, even though there is a tradition of the universities at Leuven and Ghent doing contract research for the industry. However, there is still scope to create a more innovative climate in which new knowledge is utilised earlier than is now the case. In this connection, the expectations for Flanders' FOOD are high.

Moreover, according to some interviewees, the Flemish food industry is not very advanced when it comes to using to using personal and professional networks as a tool in business development. Flanders' FOOD intends to provide food industry decision makers with opportunities for non-competitive networking to strengthen the exchange of know-how and innovation.

As mentioned, Belgian food has a strong image in the world, and the actors in the food industry are aware of the branding advantage they can use for their own products. Through FEVIA, the Flemish food industry has already attained a high level of environmental sustainability in several ways, as the following examples show:

- FEVIA has coordinated and facilitated a voluntary arrangement for recycling packaging waste.
- FEVIA has given its members a way to access information on quality and traceability requirements so that food production by-products can be used by the animal feed industry.
- Following the Kyoto Protocol, FEVIA has launched a benchmarking of food companies according to CO₂ discharge as well as a collective initiative agreed by the authorities and the sector to enhance the energy efficiency of the members' installations.

There is no doubt that these initiatives have a potential marketing value in certain consumer segments. However, there is little to suggest that either FEVIA or the companies have considered using environmentally friendly production to support a regional branding of Flemish food. This appears to be unused potential for strengthening the regional brand even more by exploring and emphasising issues concerning sustainability.

Drivers of change in the cluster

The intensifying global competition has brought new challenges to the Flemish food industry.

New supply options driver

On the supply side the enlargement of EU, the opening of the European market, and the lowering of international trade barriers mean that Flemish food companies have new opportunities to buy cheaper or better raw materials. However, the change from stable relations with (regional or local) suppliers to more spot-market-like conditions not only places demands on companies to evaluate much more complex supply chain decisions but also opens new options. Buyers must be able to evaluate different logistic options for supplies and must communicate quality parameters to suppliers. Furthermore, companies might need to have in-house competencies to perform quality audits in supplier companies to ensure quality throughout the food chain.

Trends in consumption

Global trends in food consumption are major drivers of change. Among these trends, the Flanders food companies and FEVIA are most concerned about the links between food, nutrition, and health. All interviewees are convinced that this trend will become more important in future. Mr Cahier pointed out: 'People want taste, health, and choice.'

An example of the real importance of the health issue is that Sara Lee's meat operation in Belgium produces sausages and other meat products for the Weight Watchers Company, which imposes very high standards for the products. According to Mr. Verhaeghe, this production amounts to more than 10% of the turnover in the Belgian Sara Lee meat operation.

The health emphasis, while opening opportunities for certain products, can have a negative impact on others. As already mentioned, chocolate is one of the region's strong industries. However, chocolate is considered unhealthy by some because of its fat and sugar. The chocolate industry is aware of this challenge, and Flanders' FOOD is poised to assist, e.g. by helping to develop sugar-free chocolate that tastes good.

As described, both FEVIA Flanders and Flanders' FOOD are organising activities and projects to support companies developing products with less fat and sugar and more functional ingredients, vitamins, calcium, fibres, etc.

Another important consumer trend is the growing demand for convenience and the increasing consumption of processed foods, including ready baked bread and fully prepared meals ready for the microwave. This trend offers new opportunities for an advanced food industry given that the markets are monitored closely, and Flanders' FOOD watches trends for its members.

Finally, the consumer drive for high-quality food gives a strategic advantage to the companies in the cluster, given the generally good image of Belgian food. However, using the provenance as brand is risky because the brand can easily be degraded in case of a food scandal. This is exactly what happened in 1999 when Belgian livestock were given animal feed believed to be contaminated by dioxin. This means that food manufacturers are aware of the need to ensure quality throughout the food chain and to use their organisation to ensure that black sheep in the business do not spoil the business for everyone.

In addition, while Belgian-owned companies might be interested in marketing their goods using the provenance brand, the multinational companies have a more ambiguous approach to provenance, because they are often interested in creating global brands based on original local or regional products. If the change from regional to foreign and

multinational ownership continues, the common interest in marketing food from Flanders as Belgian or Flemish can be expected to decrease.

Several interviewees observe that whereas global consumer trends play an important role in driving change, tastes are basically local or regional and are expected to remain so. They believe that the EU will never become standardised in terms of food preferences to the same degree as the US. There is and will remain in Flanders (like in all other regions) local tastes for e.g. honey cakes, special sausages, breads, etc. The local taste means that a market will remain for Flemish SMEs, who understand the local taste and how to cultivate and develop products. While fundamentally regional and traditional, these SMEs also develop their products, keeping them contemporary.

Price competition

The other important driver of change in the regional food production is price competition. With the increasingly open markets, food products from all over the world enter the European markets faster. Some of these products are manufactured in countries with considerably lower wages than in EU15. Improved transport efficiency and cooling technologies mean that it is much easier than just a few years ago to ship fresh goods like meat or dairy products over quite long distances.

The response to this challenge is unanimous. Faced with cost competition, the Flemish food industry needs to put even greater emphasis on more efficient production and product innovation. The interviewees believe that accelerated automation will take them some way towards achieving competitiveness, but that this needs to be complemented by faster product innovation. Paul Verhaeghe observes that in terms of innovation, the biggest challenge for the companies in the cluster is to overcome a certain reluctance to share knowledge with other companies. He believes that if the region is to continue at the forefront of food technology and product innovation, food companies must be more willing to share their knowledge about processes and technologies. Flanders' FOOD is an attempt to support this type of networking, which will ensure that innovation can happen faster.

Technology

As mentioned, Flemish food companies are aware of the need to keep abreast of technologies to boost production efficiency. However, it is not our impression that being at the absolute forefront of either production or nutrition technologies are priorities for the industry. Keeping abreast rather than being the developer of technologies characterises the companies in the cluster. Therefore, Flanders' FOOD is establishing a technology watch programme to ensure that technologies developed elsewhere are brought into use in the region.

Also in the field of nutrition technologies, basic innovation is mainly left to other operators, while the Flemish industry is more concerned with implementing new knowledge developed by others in their own production. Technological innovation certainly takes place, but the impression is that the innovation process is practical and driven by customer demands and technological possibilities that are readily available.

Conclusion

The food cluster in Flanders has a long history. The consolidation through mergers and acquisitions it has experienced during the last 30 years is not yet at an end. Nevertheless, a lot of small and medium sized companies continue to thrive and expand.

The key informants agree that severe cost competition from new EU member states is challenging the industry. However, the general perception is that the region has so many knowledge-based resources that it will continue to position itself positively in the home market as well as with global consumers. It is recognised that the technology transfer process in

the region has not been optimal so far, and to overcome this Flanders' FOOD has been established to encourage technology and knowledge transfer between research institutions and companies and among companies. The members of Flanders' FOOD are optimistic about the results and put considerable efforts into creating a success for the activities.

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Contact details

Companies

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Country: Belgium
Phone: +32 9 257 08 08
Email: info@algistbrug.be

Company name: Ter Beke
Website address: <http://www.terbeke.be>

Source list

Interviews (6 and 7 June 2006) with:

- Claire Bosch, secretary general, FEVIA Vlaanderen
- Leo Borms, managing director, Vondelmolen n.v. s.a.
- Marc Casier, managing director, Algist Bruggeman n.v.
- Eddy Van der Pluym, chairman of the board of Processed Meat Division Director, Ter Beke; chairman FEVIA Vlaanderen
- Paul Verhaeghe, former president of FEVIA

Statistical information from FEVIA

- <http://www.fevia.be> and <http://www.qualityfood.be> – web pages of FEVIA.
- <http://www.flandersfood.com> – website of Flanders' FOOD.
- <http://www.investinlanders.com> – inward investment web portal.
- <http://www.statbel.fgov.be> – web portal of the Belgian Ministry of Economy.
- <http://vdab.be/trends> – statistic section of the web portal of the Flemish Public Employment Service.
- http://aps.vlaanderen.be/statistiek/cijfers/stat_cijfers.htm – web portal of the Flanders Region's department for administrative planning and statistics.
- <http://www.ipv-ifp.be> – web portal of the Belgian Institute for training and education in the food industry.