



BTC TRADE FOR DEVELOPMENT



***BELGIUM MARKET FOR
FAIR (AND SUSTAINABLE)
SPORTS BALLS***

Author: Facts Figures Future, <http://www.3xf.nl>

Managing Editor: Carl Michiels

© BTC, Belgian development agency, 2010. All rights reserved.
The content of this publication may be reproduced after permission has been obtained from BTC and provided that the source is acknowledged. This publication of the Trade for Development Centre does not necessarily represent the views of BTC.

CONSUMPTION

Belgium is one of the promising EU countries for sports balls producers from developing countries. This chapter provides information on the Belgian market for sports balls, fairtrade in Belgium and fairtrade/FSC sports balls in Belgium. Belgian imports of sports balls and the most important distribution channels for sports balls in Belgium will also be discussed, together with the most important players on the Belgian (fairtrade/FSC) sports balls market. For more information on sports balls consumption on a global and EU level, please refer to chapter 4 Consumption of the main document. For consumption in other promising EU countries, please refer to the separate documents.

> BELGIAN MARKET FOR SPORTS BALLS

Belgian consumption of sports goods for team sports had a value of approximately €82 million in 2008. There are about 17,000 sports clubs in Belgium. When looking at clubs for ball sports, indoor football has the highest number of clubs (15.1% of total sports clubs). Field football comes second (14.2%), followed by volleyball (7.1%) and basketball (2.4%). The most popular brands for sports balls in Belgium are adidas, Nike, Select and Mitre.

CODES OF CONDUCT

It is estimated that more than 60% of Belgian sports balls importers have some sort of ethical code of conduct. Most of the other 40% find it important that no child labour is used, but do not take specific actions. They simply trust the producers when they say that their working conditions are in order.

> FAIRTRADE IN BELGIUM

86% of Belgians are familiar with the concept 'Fairtrade'. Despite the global recession, consumption of fairtrade products in Belgium is growing rapidly. Fairtrade products in Belgium had a sales value of approximately €56 million in 2009, a growth of 23% compared to 2008. In 2009, one out of three Belgians bought fairtrade products.

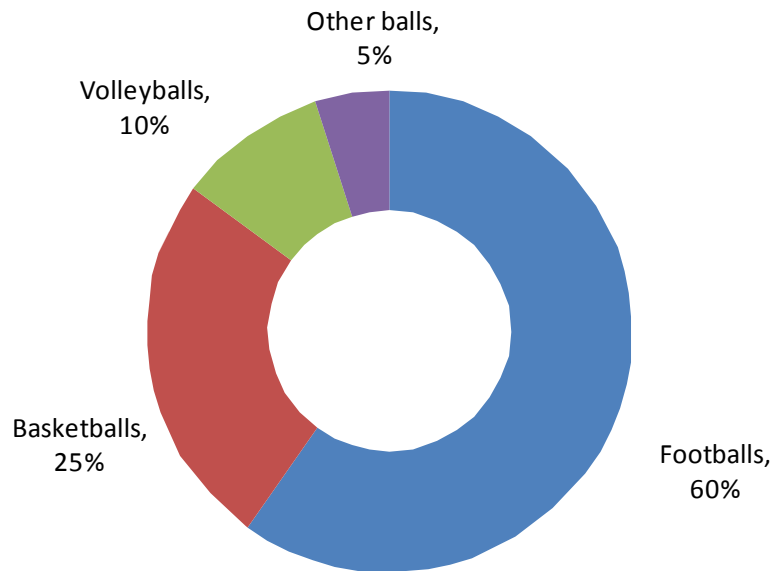
In 2009, 53% of Belgian fairtrade product buyers bought fairtrade coffee. This makes coffee the most bought fairtrade product in Belgium, followed by chocolate (26%), other food products (20%), bananas (18%) and wine (15%). Orange juice and candy showed the highest growth between 2007 and 2009.

The most important motives for Belgians to buy fairtrade products are the good cause, quality and respect for the producers. The most important motive for not buying fairtrade products by Belgians is the lack of awareness.

> BELGIAN MARKET FOR FAIRTRADE/FSC SPORTS BALLS

At least 2,350 fairtrade sports balls are sold in Belgium per year, of which about 15% are also FSC certified. Figure 1 gives an estimation of the shares of the different types of fairtrade sports balls that are sold in Belgium.

Figure 1 Types of sports balls sold, in % of total sales of fairtrade sports balls



Source: Interviews by Facts Figures Future (2010)

There are three importers of fairtrade sports balls active on the Belgian market. These importers are NJ-Appeal, Lotika and Idemasport. The first two importers sell fairtrade and FSC certified sports balls, the latter only sells fairtrade sports balls. They import their sports balls from Pakistan and are prepared to pay between 15 and 20% more for fairtrade sports balls. They found their suppliers through fairtrade organisations in their own country or through organisations in the producing country, for example IMAC.

The most important customers of fairtrade sports balls in Belgium are schools and municipalities. An increasing number of schools and municipalities are involved in fairtrade initiatives and demand for fairtrade sports balls by these customer groups is therefore expected to grow. The use of fairtrade sports balls within sports clubs is not expected to grow much, as official competition balls need the approval of sports federations such as FIFA which costs a lot of money. However, in the case of training balls, the use of fairtrade sports balls would be more accessible as training balls do not need official approvals.

Although interest in fairtrade is increasing in Belgium, the market for fairtrade sports balls is still smaller than 1% of the total sports balls market and the market for FSC certified sports balls is even smaller. Some experts indicate that they expect the market for fairtrade sports balls to grow, as interest in fairtrade is increasing and fairtrade is increasingly promoted. Other experts think that the market will not grow, due to the fact that the sports balls market is a competitive market and prices of fairtrade sports balls are higher than normal sports balls.

IMPORTS

In 2009, Belgium was a large importer of sports balls, ranking fourth in the EU, behind France and the UK, but ahead of Italy and Spain. Between 2005 and 2009, total import value annually decreased by an average 2.9% to €33 million in 2009. Since imports from DCs decreased at the same pace, the total share of DCs in import value remained virtually stable at 82%.

In 2009, leading suppliers to Belgium were China, Pakistan, the Netherlands and Thailand. China recorded high growth in the period mentioned (11% per year), while imports from Pakistan (-24%), the Netherlands (-13%) and Thailand (-7.0%) declined. Refer to Table 1 for more information.

Table 1 Imports by and leading suppliers of sports balls to Belgium, 2005-2009, share in % of value in 2009

Supplier group	2005 € mln	2007 € mln	2009 € mln	Leading suppliers in 2009	Share
Total	38	34	33		
Intra-EU	6	8	5	The Netherlands (4.7), France (3.1), Luxembourg (2.6), Germany (2.0), Italy (1.5)	16
Extra-EU excl. DCs*	1	1	1	Japan (0.6), Taiwan (0.5), USA (0.2), Canada (0.1)	1.5
DCs	31	26	28	China (62), Pakistan (14), Thailand (4.5), Mexico (0.6), India (0.5), Vietnam (0.5), Macedonia (0.1), Malaysia (0.1)	82

Source: Eurostat (2010)

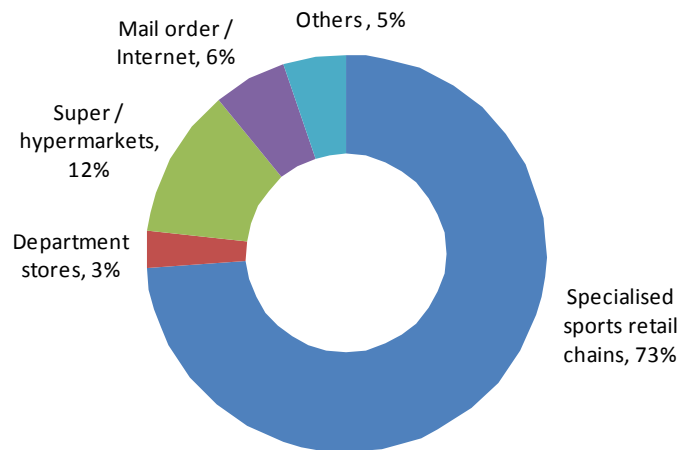
*DCs=Developing Countries

DISTRIBUTION CHANNELS IN BELGIUM

The most important distribution channels for sports balls in the EU are multinationals (like adidas and Nike, but also regional brands), sporting goods importers and wholesalers and sports retail chains. Some non-specialised retail chains, such as supermarkets, hypermarkets and department stores also have sports balls in their assortment. In the case of fairtrade/FSC/sustainable sports balls, specialised fairtrade importers are also an important distribution channel.

Demand for sports balls in Belgium comes from professional sports clubs, amateur sports clubs, schools and private persons. Figure 2 gives an overview of estimated market shares of retail trade channels for sports articles in Belgium in 2008.

Figure 2 Market shares of retail trade channels for sports articles, 2008, in %



Source: SGI (2009)

According to experts, Belgian sports clubs, schools and private persons sometimes also purchase sports balls in the Netherlands or France, especially via the web shops of sporting goods importers or sports retail chains in these countries.

> SPORTS RETAIL CHAINS

As can be seen in Figure 2, specialised sports retail chains are the most important retail trade channel for sports articles in Belgium, this also counts for sports balls. The retail sports chains generally sell well-known sports ball brands like adidas and Nike and often import directly from these large sports brands. The main customers of sports retail chains are sports clubs and private persons who purchase sports articles in the retail stores themselves or through their web shops. The largest sports retail chains in Belgium are:

- > **Decathlon** - <http://www.decathlon.be> - international sports retail chain with 11 shops in Belgium. Sells sports balls of well-known brands, but also of its own private label Kipsta. Although these sports balls are not fairtrade, Decathlon does have two codes of conduct: the code of conduct of the French sporting goods association and an international code of conduct.
- > **Fairplay Sports** - <http://www.fairplaysports.be> - buying group of sporting goods, sells sports balls of well-known brands such as adidas, Nike, Derbystar and Puma, but does not have fairtrade sports balls in its range. However, it is possible to order fairtrade sports balls of Derbystar on demand.
- > **Go Sports** - <http://www.groupegosport.com> - international sports retail chain with 7 establishments in Belgium. Sells sports ball of well-known brands, but also of its own private label Go Sports. Follows the code of conduct of the French sporting goods association.
- > **Intersport** - <http://www.intersport.be> - international sports retail chain with 13 establishments in Belgium. Intersport does not have fairtrade sports balls in its standard assortment. However, it does have its own code of conduct.
- > **Sports Direct** - <http://www.sportsdirect.com/eurosite/stores/belgium.html> - international sports retail chain with 42 establishments in Belgium.

Sells sports balls of well-known brands such as adidas, Nike, Puma and Mitre. Does not have fairtrade balls in its assortment.

- > **United Brands** - <http://www.unitedbrands.be> - sports retail chain with 10 establishments in Belgium. Sells sports balls of well-known brands such as adidas, Nike and Puma.

> SPORTING GOODS IMPORTERS/WHOLESALERS

Importers and wholesalers in Belgium mainly sell to schools and sports retail chains and sometimes also to non-specialised retail chains such as department stores and supermarkets. Wholesalers increasingly sell to sports clubs as well, for example by visiting the clubs and exhibiting their products in the club canteens. Distributors of well-known brands as adidas and Nike also directly visit sports clubs and try to sell their products in this way.

- > **Adec SPORT** - <http://www.adecsport.be> - wholesaler in sporting goods. Sells different types of sports balls of different brands.
- > **Allard Sport** - <http://www.allardsport.com> - specialised in supplying equipment for sports halls. Also offers some sports balls.
- > **BO Sport** - <http://www.bosport.be> - importer of sporting goods. Sells different types of sports balls of the brands Select and Gala (producer in the Czech Republic).
- > **BSD** - <https://sportspel-be.firstfind.nl> - wholesaler in sporting goods, including different types of sports balls. Its main customers are sports clubs and schools.
- > **Buva sports** - <http://www.buvasport.com> - wholesaler in sporting goods for basketball and golf. Sells basket balls of the brand Spalding.
- > **Idemasport** - <http://www.idemasport.com> - Belgian importer of sporting goods. Started to include fairtrade training balls for football, basketball and volleyball in its assortment three years ago and markets the balls under its own private label, Megaform. Has found its suppliers in Pakistan through local fairtrade associations. The main customers for the fairtrade balls are Belgian schools and municipalities.
- > **Janssen en Fritsen** - <http://www.janssen-fritsen.be> - importer of sports equipment, including balls. Only sells sports balls of well-known brands such as adidas, Derbystar and Nexan. Does not have its own code of conduct, but trusts that its sports balls suppliers comply with the codes of conduct of the large brands. Janssen and Fritsen is one of the most important suppliers of sporting goods to schools in Belgium.
- > **Olympic Sportswear** - <http://www.olympic-sportswear.com> - wholesaler in sporting clothes and sports balls of the brand Olympic. Does not have a code of conduct, but trusts that the balls are made in a fair way. Mainly sells to sports retail chains.
- > **Remasport** - <http://www.remasport.be> - Belgian wholesaler in sporting goods. Offers different types of sports balls of different brands. Sports clubs are an important customer of Remasport.
- > **Sportibel** - <http://www.sportibel.com> - importer of sporting goods, including different types of balls. Sells sports balls under its own private label, Sportibel.
- > **Tamaro Sport** - <http://www.mitre.be> - distributor of sports equipment of the Mitre brand, including balls.

> OTHERS

Other distribution channels for (fairtrade) sports balls in Belgium are specialised fairtrade importers and non-specialists such as department stores, hypermarkets and the Internet. Mail order also plays quite an important role in Belgium. Examples of these other channels are:

- > **Carrefour** - <http://www.hypercarrefour.be> - international chain of hyper and supermarkets that have fairtrade products in its assortment. Does not sell fairtrade sports balls at the moment.
- > **Delhaize** - <http://www.delhaize.be> - Belgian supermarket chain that sells fairtrade products. It does not have fairtrade sports balls in its fixed assortment, but has shown an interest in having fairtrade sports balls as a temporary product in its assortment during Christmas and important football events.
- > **Fairtrade Belgium** - <http://fairtrade.be> - Belgian importer of fairtrade products. Information about fairtrade products, fairtrade figures and fairtrade research. At the moment, they do not import sports balls, as demand in Belgium for fairtrade sports balls is too low.
- > **La Redoute** - <http://www.laredoute.be> - mail order company that also sells sporting goods.
- > **Lotika** - <http://www.lotika.be> - Dutch company that sells fairtrade/FSC foot, basket and volley balls under the brand name Ethletic. Lotika mainly sells to private consumers through their web shop.
- > **NJ-Appeal** - <http://www.nj-appeal.com> - Belgian importer of fairtrade/FSC foot, basket, rugby and volley balls that sells the balls under its own brand name NJ-Appeal.
- > **Oxfam Wereldwinkels** - <http://www.oxfammagasinsdumonde.be> - specialised importer of fairtrade products. However, they do not sell sports balls.
- > **Sportime** - <http://www.sportime.be> - mail order company specialised in sporting goods. Belongs to the German company Sport Thieme. Its main customers are sports clubs and schools. Sells sporting balls of large brands like adidas, but also markets its own private label balls of Sport-Thieme.

For more sports retail chains, sporting goods importers/wholesalers and other companies related to sporting goods in Belgium, please search in directories with keywords such as 'sporting articles', 'sportartikelen' and sporting goods. Examples of directories are Europages (<http://www.europages.com>) and the Company Guide Belgium (<http://www.bedrijvengids-belgien.be>).

> HOW TO DO BUSINESS IN BELGIUM

Belgian companies are relatively open to international trade and quite familiar with dealing with foreign companies. There are some cultural differences between Flanders, the Dutch speaking part of Belgium, and Wallonia, the French speaking part of Belgium. For information on how to do business in Belgium, please refer to <http://www.kwintessential.co.uk/etiquette/doing-business-belgium.html>.

> USEFUL SOURCES

- > **Adeps** - <http://www.adepts.be> - Wallonian association for sports and recreation. Provides links to different sports federations in Wallonia, including ball sport federations.
- > **Belgian Football Association** - <http://www.footbel.com>.
- > **Equidurable** - <http://www.equidurable.be> - online guide with information about fairtrade and fairtrade importers in Belgium.
- > **Fair en Duurzaam** - <http://www.fairenduurzaam.be> - online guide with information about fairtrade in Belgium.
- > **Fairtrade Gemeente** - <http://www.fairtradegemeenten.be> - information about Belgian municipalities, sports clubs, churches and schools that are involved in fairtrade initiatives.
- > **Flemish Sport Federation** - <http://www.vlaamsesportfederatie.be> - sports federation for the Dutch speaking part of Belgium (Flanders). Provides links to different sports associations in Flanders.
- > **Francophone Sports Association (AISF)** - <http://www.infosport.be> - sports federation for the French speaking part of Belgium (Wallonia). Provides links to different sports associations in Wallonia.
- > **ISB** - <http://www.isbvzw.be> - Flemish institution for sports and recreation. Publishes statistics about sports participation in Belgium.
- > **Max Havelaar Belgium** - <http://www.maxhavelaar.be> - information about fairtrade products, fairtrade figures and fairtrade research.
- > **Trade for Development Centre** - <http://www.befair.be> - information portal about fairtrade in Belgium.

