



***BTC TRADE FOR DEVELOPMENT***



# ***SUSTAINABLE COFFEE***

***THE AVAILABILITY OF SUSTAINABLE COFFEE  
IN THE ASSORTMENTS OF BELGIAN SUPERMARKETS***

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

Managing Editor: Carl Michiels

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# INTRODUCTION

## Objective

This study aims to give an overview of the current and future availability of sustainable coffee in the assortments of major Belgian supermarkets.

## Definitions

Coffee has been divided into four product groups:

### Ground coffee

The product group ground coffee includes all packages of ground coffee ranging from 250 to 1,500 grams. The most common packages offered in Belgian supermarkets are those of 250 and 500 grams.

### Coffee pads and cups

The product group coffee pads and cups includes coffee pads packages ranging from 12 to 36 pads and coffee cups packages ranging from 8 to 16 cups. The most common packages in Belgian supermarkets are packages of 18 and 36 pads and packages of 10 and 16 cups.

### Instant coffee

Instant coffee includes all jars of instant coffee ranging from 50 gram to 400 grams. Sachets of instant coffee have not been included. The most common sizes of instant coffee in Belgian supermarkets are those of 100 and 200 grams.

### Coffee beans

The product group coffee beans includes all packages of coffee beans ranging from 250 grams to 2500 grams, of which packages of 250 and 500 grams are the most common in Belgian supermarkets.

Each brand, package size and type of coffee within these product groups and size ranges were counted separately (including different sizes and types of the same brand).

### Sustainable

The definition of 'sustainable' can be interpreted very broadly. In this study, the term 'sustainable coffee' refers to coffee that carries a sustainable label such as UTZ, Rainforest Alliance, Max Havelaar/Fairtrade or bio labels such as EU organic or Agriculture Biologique.

## Product classification

For statistical purposes, the following HS codes have been included in the research:

HS code	Definition
090111	Coffee (excluding roasted and decaffeinated)
090112	Decaffeinated coffee (excluding roasted)
090121	Roasted coffee (excluding decaffeinated)
090122	Roasted, decaffeinated coffee
210111	Extracts, essences and concentrates, of coffee

These HS codes have been used to calculate international trade statistics. For this purpose, ITC Trade Map figures have been used. However, the figures should be interpreted carefully and should only be used as an indication of the market and its developments.

## Research Methodology

A major part of the research consisted of store visits to 1 or 2 branches of the twelve major Belgian supermarket chains, conducted in the period 22-24 November 2011.

During these store visits, the availability of coffee (per product group) with a sustainable label in the assortment of each supermarket was calculated by counting how many of the total variety of coffee products within a product group carried a sustainable label. All supermarket chains have received the results of the store visits. The majority of the supermarkets have responded to the results and confirmed them.

Furthermore, this report is the result of:

⇒ Desk research.

⇒ Primary research such as:

- Interviews with major Belgian supermarkets.
- Interviews with certification bodies, such as UTZ, Rainforest Alliance and Max Havelaar/Fairtrade.
- Interviews with Belgian coffee roasters.



# 1. COFFEE IN BELGIUM

## 1.1. Consumption

Belgium is a medium-sized coffee consumer in the European Union. Coffee consumption can be divided into two segments:

**At-home.** Around 70% of coffee consumption in Belgium takes place at home<sup>1</sup>. The at-home market is becoming increasingly diverse as a result of new, innovative coffee consumption methods such as coffee pads and cups.

**Out-of-home.** Around 30% of coffee in Belgium is consumed out of home<sup>2</sup>, for example at work, in coffee shops, in restaurants, at public institutions or at petrol stations.

Total Belgian coffee consumption represented 52.8 thousand tonnes in 2010, an increase of 0.5% compared to 2009. Belgian per capita coffee consumption was 4.87 kilo in 2010<sup>3</sup>.

## 1.2. Imports

Belgium is the sixth largest coffee importer in the world and the fourth largest in the EU, behind Germany, France and Italy, but ahead of the UK and Spain<sup>4</sup>. Not only has Belgium a rather large coffee roasting industry, but the port of Antwerp is also one of the main ports in Europe in terms of transshipment facilities.

In 2010, Belgian coffee imports had a value of around €882 million, or 341 thousand tonnes in volume. For more information refer to Table I.

**Table I : World coffee imports, per country, 2007-2010, in € million**

Country	Import value 2007	Import value 2008	Import value 2009	Import value 2010
USA	2,844	3,088	3,003	3,814
Germany	2,189	2,446	2,212	2,846
France	925	1,048	1,134	1,379
Japan	866	950	917	1,149
Italy	831	977	916	1,012
<b>Belgium</b>	<b>503</b>	<b>870</b>	<b>754</b>	<b>882</b>
Canada	541	597	627	804
The UK	522	593	614	743
Spain	502	619	585	722
Russia	431	456	422	568

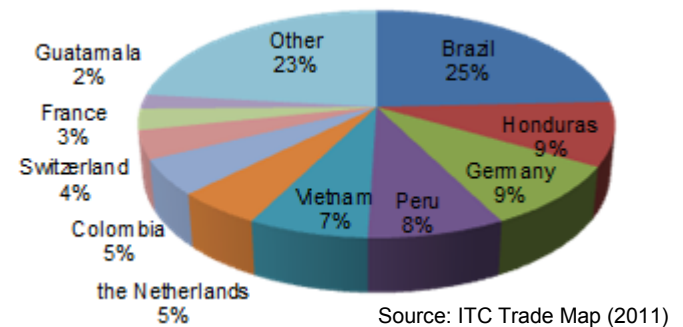
Source: ITC Trade Map (2011)

Coffee imports from developing countries accounted for more than 76% of total Belgian coffee imports. Total Belgian coffee imports increased by more than 20% on average per year between 2007 and 2010. Imports from developing countries increased even more during the same period, by an average of 27% per year<sup>5</sup>.

## 1.3. Supplying markets

Brazil was the leading coffee supplier to Belgium in 2010. Other non-European coffee suppliers to Belgium were Honduras, Peru, Vietnam, Colombia, Guatemala, Mexico, Ethiopia, Uganda, Nicaragua and Kenya. For more information refer to Figure I.

**Figure I Supplying markets of coffee to Belgium, 2010, in %**



## 1.4 Exports

Belgium holds an important trading position. In 2010, Belgium exported 278 thousand tonnes of coffee. The Netherlands (46%), France (33%) and Germany (11%) were the most important export destinations<sup>6</sup>.

## 1.5 Trends

The coffee culture in Belgium is shifting from ground coffee to single-serve methods such as coffee pads and cups. The ease-of-use of these products and the wide variety of flavours have contributed to an increase in their popularity.

A typical coffee blend in Belgium consists of 75% of Arabica coffee and 25% of Robusta coffee. However, demand for high-quality coffee blends, single-origin, certified organic and sustainably produced and flavoured coffee is increasing<sup>7</sup>.

Sustainability labels, such as UTZ, Rainforest Alliance, Max Havelaar/Fairtrade and bio labels, are gaining importance in Belgium.

## 2. COFFEE IN BELGIAN SUPERMARKETS

### 2.1 Leading coffee roasters

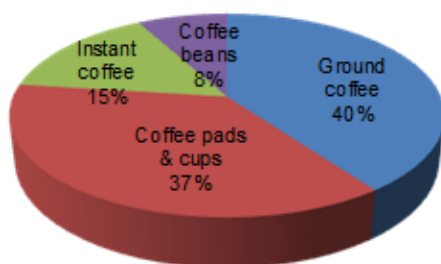
The largest coffee roasters on the Belgian market are Douwe Egberts (DE - <http://www.douwe-egberts.be>) and Kraft (<http://www.kraftfoods.be>). Belgium has some small national roasters as well, for example:

- Beyers - <http://www.beyerskoffie.be>.
- MIKO - <http://www.miko.eu>.
- Rombouts - <http://www.rombouts.com>.
- Simon Lévelt - <http://www.simonlevelt.nl>, which is a 100% certified coffee roaster.

### 2.2 Leading brands

Ground coffee is the largest product group within the coffee assortments of the major Belgian supermarkets, representing an average of 40% of their total coffee assortment. For more information refer to Figure II.

Figure II Product groups within the coffee assortment of the major Belgian supermarkets, November 2011, in %



Douwe Egberts (DE) is the leading brand for all product groups (except for instant coffee) in the coffee assortments of major Belgian supermarkets. Other examples of coffee brands are:

- Rombouts (ground coffee, beans and pads).
- Jacqmotte (ground coffee, beans and pads).
- Café Liegeois (pads).
- Nescafé (instant coffee and coffee cups).
- Beyers (ground coffee and pads).
- Lavazza (ground coffee and pads).
- Segafredo (ground coffee and pads).
- Kimbo (ground coffee and pads).
- Illy (ground coffee).
- Zwarte Kat (ground coffee).
- Private label coffee.

### 2.3 Sustainable coffee

Global sustainable coffee sales increased by more than 433% between 2004 and 2009. Around 8.0% of worldwide coffee sales carried a sustainable label in 2010, compared to 6.0% in 2008 and only 1.0% in 2002<sup>8</sup>. The market for certified coffee in Belgium was estimated to lie around 10% in 2009<sup>9</sup>.

However, the situation in the coffee assortments of major Belgian supermarkets was far better in 2011. Store visits to several branches of the main Belgian supermarket chains in November 2011 revealed that around 35% of the coffee displayed carried a sustainable label.

UTZ (<http://www.utzcertified.org>) was the leading sustainability label for coffee in major Belgian supermarkets at an estimated share of almost 80%. This can be explained by the fact that the majority of Belgian supermarkets offer Douwe Egberts coffee, which has an alliance with UTZ CERTIFIED.

UTZ CERTIFIED is a certification label in use worldwide that provides a guarantee of responsible coffee production, sourcing and traceability of the final product. According to UTZ, their market share in Belgium is around 10%.



The Max Havelaar/Fairtrade label (<http://www.maxhavelaar.be>) was the second most important sustainability label for coffee (almost 12%). The Fairtrade label ensures that producers in developing countries receive a minimum price for their products.



Belgian coffee roasters such as Rombouts, Beyers and MIKO have already launched a range of coffee products with the Max Havelaar/ Fairtrade label. However, this is still a very small share of their total assortment.

Belgian Max Havelaar/Fairtrade coffee sales accounted for around 3.0% of the total Belgian coffee market in 2010<sup>10</sup>. The market is particularly stimulated by the out-of-home channels, where Fairtrade coffee con-

Rainforest Alliance (<http://www.rainforest-alliance.org>) was the third most important sustainability label for coffee at around 2.1%. Coffee roasters Kraft and Beyers have already launched a range of coffee products with the Rainforest Alliance label.



The Rainforest Alliance works to conserve biodiversity and ensure sustainable livelihoods by transforming land-use practices, business practices and consumer behaviour.



More than half of the coffee with the Max Havelaar/Fairtrade label also carried a bio label such as the EU organic label ([http://ec.europa.eu/agriculture/organic/home\\_en](http://ec.europa.eu/agriculture/organic/home_en)) or the French Agriculture Biologique label (AB - <http://www.agencebio.org>).



Coffee berries © Oliver Neumann

Other sustainable coffee labels that were found are the DNV label (<http://www.dnv.nl> - for coffee from the Illy brand) and certified private labels (mainly from the supermarket chain Delhaize).

## 2.4. Market Shares of major supermarkets in Belgium

To estimate the availability of sustainable coffee in Belgian supermarkets, an indication is given of the share of sustainable coffee in the average assortments of the twelve major supermarket chains in Belgium, which are:

**Colruyt:** Market share 22.8%

**Delhaize:** Market share 22.6%

**Carrefour:** Market share 19.8%

**Aldi:** Market share 11.2%

**Lidl:** Market share 5.6%

**Makro :** Market share 19.8%

**Cora:** Market share 3.0%

**Spar:** Market share 2.8%

**Champion:** Market share 2.2%

**Intermarché:** Market share 1.7%

**Match:** Market share 1.6%

**Smatch:** Market share <1%

Colruyt, Delhaize, Carrefour, Aldi and Lidl dominate the Belgian retail market, holding a market share of around 76% in 2010/12.

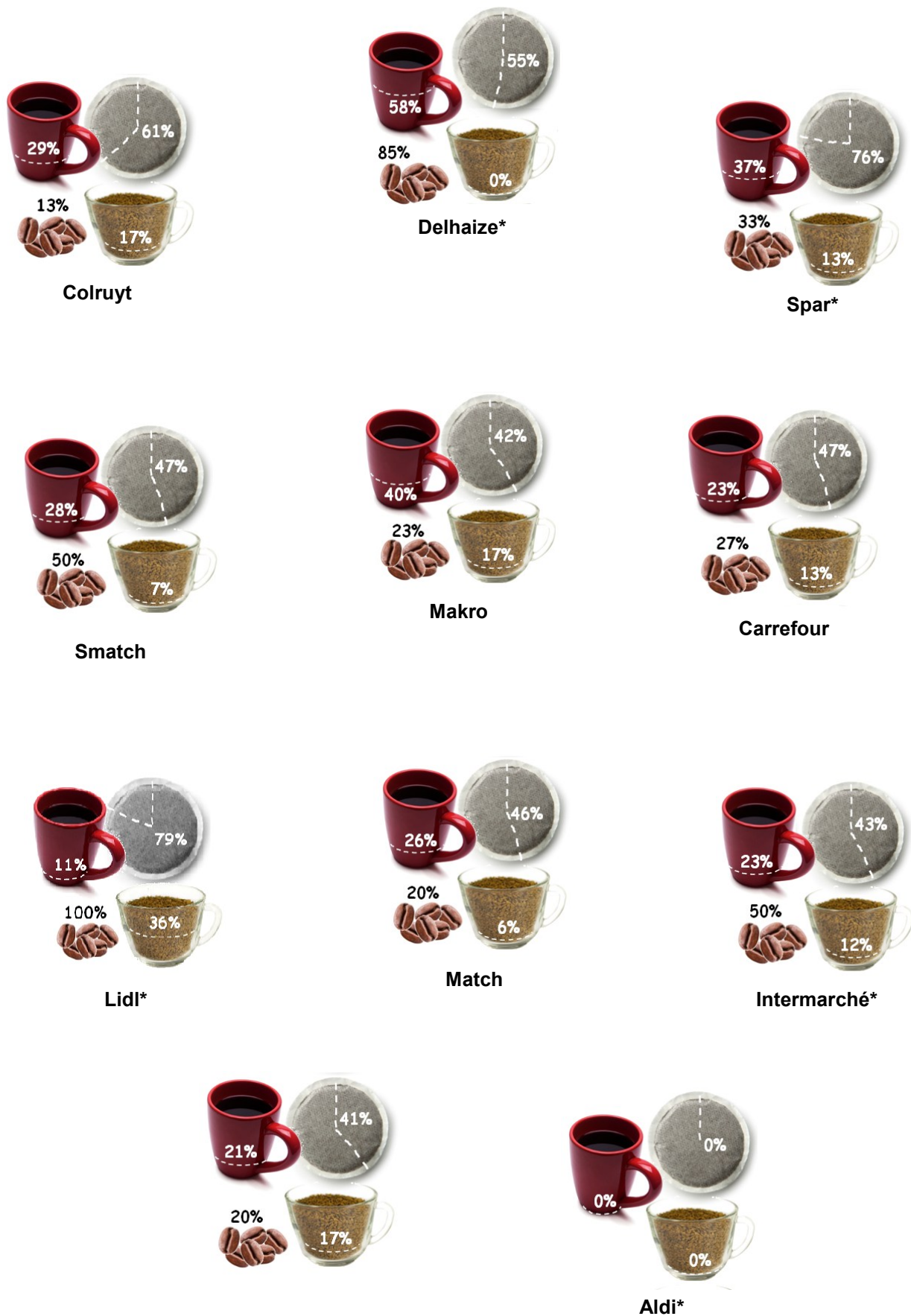
## 2.5. Sustainable coffee in Belgian supermarkets

Figure III gives an overview of the average availability of sustainable coffee in the assortment, per supermarket, divided into four product groups: ground coffee, coffee pads and cups, instant coffee and coffee beans<sup>13</sup>.

Figure IV gives an overview of the average availability of sustainable private label coffee in the assortment, per supermarket and product group<sup>14</sup>.

The percentages in Figure III and IV represent, per product group, the estimated share of coffee products that carry a sustainable label in the assortment, per supermarket.

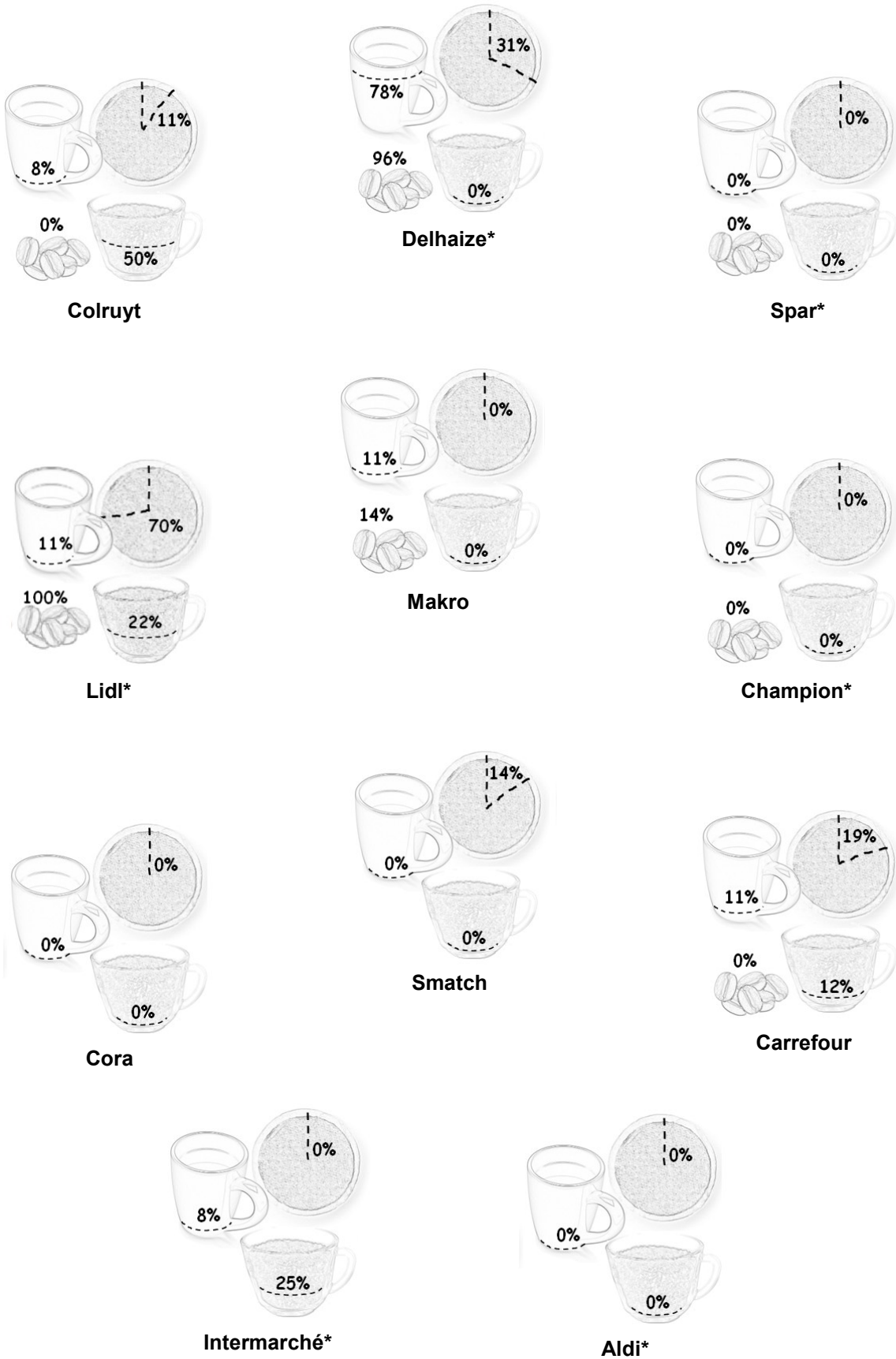
**Figure III: Share of coffee with a sustainable label, per product group, in the assortments of Belgian supermarkets, November 2011**



\*Confirmed by supermarket



**Figure IV: Share of private label coffee with a sustainable label, per product group, in the assortments of Belgian supermarkets, November 2011.**



## 2.5.1 Share of sustainable coffee products per supermarket

### Ground coffee

The average availability of ground coffee with a sustainable label in the assortments of major supermarket chains in Belgium is 31% (in November 2011)<sup>15</sup>.

Delhaize is the frontrunner in the offer of sustainable ground coffee (58%). Makro and Spar follow and score above average at 40% and 37% respectively. The availability of sustainable ground coffee in the assortments of Champion, Colruyt, Smatch, Match, Carrefour, Intermarché and Cora lies close together, ranging from 21% to 31%. Lidl scores far below average (11%) and Aldi does not offer sustainable ground coffee at all.

### Coffee pads and cups

Coffee pads and cups is the product group with the highest sustainability level. The average availability of coffee pads and cups with a sustainable label in the assortments of major supermarket chains in Belgium is 50%<sup>16</sup>. This can be explained by the high presence of Senseo (DE) coffee pads, which all carry the UTZ label.

Lidl has the highest availability of sustainable coffee pads and cups (79%), followed by Spar (76%), Colruyt (61%), Delhaize (55%), and Champion (54%). The availability of coffee pads and cups with a sustainable label in the other supermarkets ranges from 41% to 47%. Except for Aldi, who does not offer sustainable coffee pads and cups at all.

### Instant coffee

Instant coffee is the product group with the lowest sustainability level. The average availability of sustainable instant coffee in the assortments of the major supermarket chains in Belgium is 12%<sup>17</sup>.

Lidl has the most sustainable instant coffee assortment (36%), followed by Colruyt, Makro and Cora (all 17%). Delhaize and Aldi do not offer instant coffee with a sustainable label. This is surprising for Delhaize given that the supermarket chain does very well in the other product groups.

### Coffee beans

The average availability of coffee beans with a sustainable label in the assortments of the major supermarket chains in Belgium is 31%<sup>18</sup>.

Lidl is the absolute winner when it comes to the availability of sustainable coffee beans, with a sustainable share of 100%, followed by Delhaize (85%). Smatch and Intermarché follow at a distance at 50%.

Refer to Table II for an overview of sustainability labels available in the coffee assortments of major Belgian supermarkets.

Table II Available sustainability labels for coffee products per supermarket, November 2011

Supermarket	UTZ	Rainforest Alliance	Max Havelaar/Fairtrade	Bio labels
Aldi				
Carrefour	X		X	X
Champion	X		X	X
Colruyt	X	X	X	X
Cora	X		X	X
Delhaize	X	X	X	X
Intermarché	X		X	
Lidl	X		X	
Makro	X	X	X	X
Match	X	X	X	
Smatch	X		X	
Spar	X			X

Source: Store visits in November 2011

## 2.5.2 Share of sustainable private label coffee products per supermarket

### Ground coffee

The average availability of private label ground coffee with a sustainable label in the assortments of the major supermarket chains in Belgium is 19%<sup>19</sup>. This is below the average of the total ground coffee assortments of the major supermarkets (31%).

Delhaize is the absolute frontrunner in the offer of sustainable private label ground coffee (78%). The majority of their private label ground coffee carries either the Max Havelaar/Fairtrade label or their own sustainability label 'Controle & Origine'. Lidl, Carrefour and Makro all lag behind at 11%, followed by Intermarché (8.3%) and Colruyt (7.7%). The other supermarkets do not offer private label ground coffee with a sustainable label.

### Coffee pads and cups

Although this product group scores highest in the total pads and cups assortment of the major supermarket chains, the average availability in the private label category is merely 17%<sup>20</sup>.

Lidl holds the lead again with an average sustainable private label coffee pads and cups assortment at 70%, followed by Delhaize (31%). Carrefour comes next at 19%, followed by Match and Smatch (both 14%) and Colruyt (11%). The other supermarkets do not offer sustainable private label coffee pads and cups at all.

### Instant coffee

The average availability of private label instant coffee with a sustainable label in the assortments of the major supermarket chains in Belgium is 14%<sup>21</sup>.

Colruyt has the most sustainable private label instant coffee assortment (50%), followed by Intermarché (25%), Lidl (22%) and Carrefour (12%). The other supermarkets do not offer private label instant coffee with a sustainable label.

### **Coffee beans**

Coffee beans is the product group with the highest sustainability level in the private label coffee assortments of the major Belgian supermarkets, with an average availability of sustainable coffee beans at 30%<sup>22</sup>.

This highest sustainability level is driven by Lidl since 100% of Lidl's private label coffee beans are UTZ certified. Delhaize also scores high in this category as 96% of their coffee beans carry either Max Havelaar/Fairtrade or their own sustainability label 'Controle & Origine'. In addition, Makro offers sustainable private label coffee beans with the Max Havelaar/Fairtrade label (14%). The other supermarkets do not have private label coffee beans or their coffee beans do not carry a sustainable label.

## **2.6 Future expectations**

Belgian consumers are increasingly concerned about the safety of their food, as well as the environmental and social implications of its production. They are becoming more aware of the meaning of 'sustainable' and increasingly demand such products from their retailers.

As a result, the market share of environmentally and socially certified coffee has grown considerably in recent years and Belgian retailers are expected to increase their availability of sustainable coffee products considerably in the years to come. However, Belgium still lags behind in the availability of sustainable coffee compared to countries such as the Netherlands, the UK and France<sup>23</sup>.

Aldi is the only supermarket that does not offer coffee products with a sustainable label and the supermarket chain does not give any signs of changing this in the short term<sup>24</sup>. Aldi is working with the 4C project (Common Code for the Coffee Community), which is less demanding than most existing fair trade and ethical certifications.

In addition, Belgian coffee roasters, such as Douwe Egberts, Rombouts, Beyers and Kraft have made commitments to extend their sustainable coffee supply which will make it easier for Belgian retailers to include sustainable coffee products in their assortments.

Delhaize has already taken the lead in making their private label coffee assortment more sustainable and other supermarkets are expected to follow.

### **Delhaize**

*Delhaize introduced Max Havelaar/Fairtrade certified products into their assortment in 1990. In 2002, they launched a new quality label 'Controle & Origine'. This label is used for some of their private label products, especially coffee, and guarantees that the products are produced in a sustainable way.*

*Delhaize participated actively in the Belgian Fairtrade week from 5-15 October 2011 by promoting Fairtrade products in their supermarkets and introducing new Fairtrade products into their assortment. Among these new products were 15 private label coffee products with brightly coloured packages making it easier for customers to recognise them!*



*During the first semester of 2011, the sales of Fairtrade products in Delhaize supermarkets increased by 10% compared to the same period in 2010.*

*Delhaize holds a leading position in offering sustainable products. Thanks to their efforts, Fairtrade products are gaining ground in Belgium and Delhaize is planning to extend their Fairtrade assortment even more<sup>25</sup>.*

### **Carrefour**

*Carrefour has a private label product range with the name 'Carrefour Solidair' which carries the Max Havelaar/Fairtrade and/or a bio label. This range also includes ground coffee, coffee pads and instant coffee. Carrefour is extending the range of their sustainable products continuously and with success.*

*The number of available private label organic food products increased by 59% between 2007 and 2010 and the number of private label products with the Max Havelaar/Fairtrade label even increased by 220%<sup>26</sup>.*

### Champion

Supermarket chain Champion has a separate section with sustainable products from the brand 'Ethiquable' which carry the Max Havelaar/ Fairtrade label and/or a bio label. There is one shelf completely dedicated to sustainable coffee (ground coffee and coffee pads).



In 2012, Champion is planning to increase their availability of sustainable private label coffee by working together with Carrefour and introducing private label coffee of the brand 'Carrefour Solidair' into their assortment. The private label coffee of Carrefour Solidair carries the Max Havelaar/Fairtrade and/or a bio label<sup>28</sup>.

### Colruyt

Colruyt has been investing in a sustainable development policy since 1990, which includes various areas: product sourcing, retail investments and consumption at consumer level. They are already well advanced in improving sustainability and the availability of sustainable products in their assortment is just a part of their sustainable development policy. Colruyt has a clear objective to further improve their sustainability at different levels (ecological, social and economic).

In 2005, Colruyt started with the 'Collibri for education' project. Herewith, they launched a range of private label products with the Collibri label, including all typical products from developing countries, as well as coffee. Collibri products carry at least one sustainable label such as Rainforest Alliance, Max Havelaar/Fairtrade or a bio label. Furthermore, Colruyt invests 5% of the price of the products in education projects in developing countries. The supermarket chain is planning to extend their range of Collibri products even more as they expect demand for sustainable products to rise<sup>27</sup>.



### Lidl

As a result of increasing customer demand for Fairtrade products, Lidl decided to introduce private label Max Havelaar/Fairtrade certified products to their assortment under the name 'Fairglobe' in 2008. These products also included ground coffee, coffee pads and instant coffee. Enthusiastic reactions from their customers have made Lidl decide to expand their Fairglobe assortment even more<sup>29</sup>.



### Spar

Supermarket chain Spar leaves many of the decisions regarding stocks up to its franchises. This means that the products offered in Spar supermarkets vary greatly between different locations. In general, consumers mostly have a choice between a sustainable and non-sustainable product. Spar holding is also making sustainable options increasingly available to its franchises<sup>30</sup>.

### Intermarché

The assortment of Intermarché supermarkets can differ per store, as the store managers are not only buying from a centralised purchasing department, but can also order directly with suppliers.

Intermarché introduced Fairtrade products into their assortment several years ago. Nowadays over 120 products with the Fairtrade label can be found on their shelves, including coffee.



Intermarché also made a commitment to make their own brand 'Selection de Musketiers' more environmental friendly.

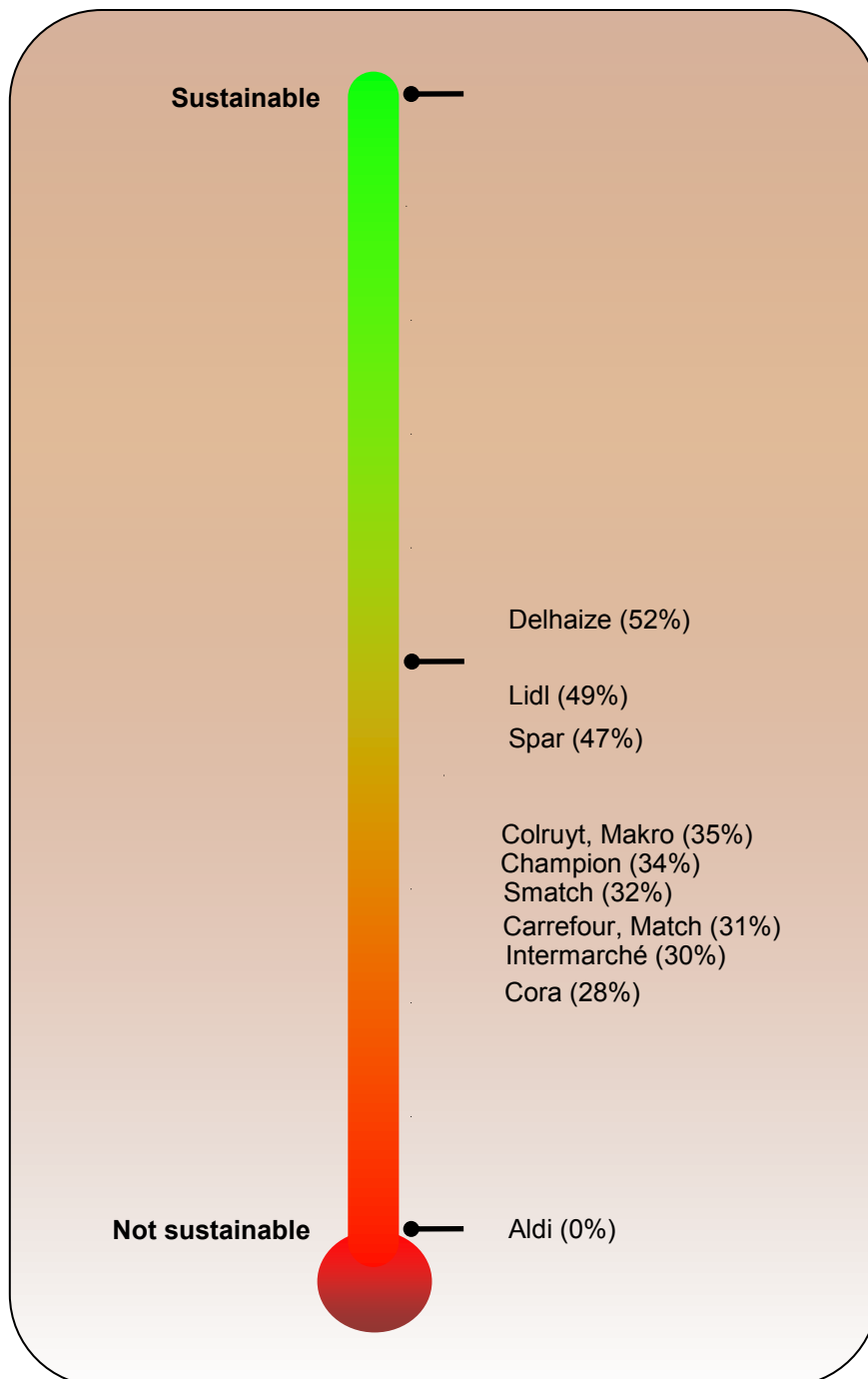
The objective of Intermarché for 2012-2014 is to expand the offer of sustainable products and create more awareness about sustainability among their clients. At the beginning of 2012, they are planning to work directly with a supplier of sustainable products so that the centralised purchasing department can offer a wider range of sustainable products<sup>31</sup>.

Not only are Belgian supermarkets increasingly offering sustainable coffee, other sales points are also arising. Specialised organic retailers and catering companies are increasingly turning to sustainable coffee as well. Fast food retail chain McDonalds for example, decided to only serve UTZ certified coffee in Belgium, which means more than 1 million cups a year<sup>32</sup>.

### 3. CONCLUSION

Which Belgian supermarkets currently have the most sustainable coffee assortment? Take a look at the sustainability meter below and decide for yourself!

The percentages include all four coffee product groups (ground coffee, coffee pads and cups, instant coffee and coffee beans) and represent, per supermarket, the average share of the total coffee assortment that carries a sustainable label<sup>33</sup>.



## SOURCES

- <sup>1/2</sup> Report 'Met Fairtrade verbeter je de wereld', <http://www.vvsg.be>
- <sup>3</sup> Royal Belgium Coffee Roasters Association (2011)
- <sup>4/5/6</sup> ITC Trade Map, HS codes 090111, 090112, 090121, 090122 and 210111 (2011)
- <sup>7</sup> CBI Market survey: 'Coffee in Belgium' (2011)
- <sup>8</sup> Report 'The State of Sustainability Initiatives Review 2010' published by the International Institute for Sustainable Development (IISD)
- <sup>9</sup> ITC Report 'Trends in the trade of certified coffees' (2011)
- <sup>10</sup> Fairtrade Labelling Organisation (FLO, 2010)
- <sup>11</sup> Flemish centre for agriculture and horticulture (VILT - 2011)
- <sup>12</sup> <http://www.retaildetail.eu> (2011)
- <sup>13-22</sup> Store visits during 22-24 November
- <sup>23</sup> Interview with coffee roaster Rombouts (2011)
- <sup>24</sup> Report 'Ethische handel in de supermarkt' (2010)
- <sup>25</sup> Delhaize website (2011)
- <sup>26</sup> Carrefour 'Annual Activity and Sustainability Report' (2010)
- <sup>27</sup> Colruyt website
- <sup>28</sup> Interview with head office of Champion
- <sup>29</sup> Interview with communication and press manager of Lidl
- <sup>30</sup> Interview with purchaser of Spar
- <sup>31</sup> Interview with sales developer of Intermarché
- <sup>32</sup> McDonalds website
- <sup>33</sup> Store visits during 22-24 November

## Useful sources

- CBI market surveys - <http://www.cbi.eu>
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- Websites of Belgian supermarkets.