**Executive summary**

**Market study on the presence of sustainable products in Belgian supermarkets**

This study, commissioned by the Trade for Development Centre (TDC) and realized by Dedicated between December 21, 2015 and January 29, 2016, attempted to draw up a statement of condition on the presence of sustainable products within the assortments of major Belgian supermarkets. Similar studies had been performed in 2011 and 2012.

For this study, the TDC chose to focus on 6 product categories originating from developing countries: coffee, cocoa, bananas, tea, cane sugar and rice. By “sustainable”, we mean, in the context of this study, products bearing at least one of the following labels: Fairtrade, UTZ Certified, Rainforest Alliance and Bio (organic). These are so-called “third party”-certifications, the compliance of which being verified by an external and independent organization.

Supermarket chains are major players in the sale of sustainable products; in 2015, 42% of organic products were purchased in conventional supermarkets, compared to 33% in specialist stores[[1]](#footnote-1). Furthermore, Fairtrade Belgium says that 53% of fair trade purchases are made in supermarkets. The role of supermarkets in the promotion of these types of products is therefore undeniable.

Upon conclusion of this study, it appears that sustainable cane sugar is the product category that is proportionally most represented in Belgian supermarkets (with an average of 74% compared to the total offering). This is followed by bananas (63%), tea (30%), cocoa (29%), coffee (22%), and lastly rice (9%). In terms of development, we observe that since 2012, certified bananas and cocoa have seen a marked improvement, while certified sustainable tea and coffee have seen a decline.

For coffee, the label with the greatest presence is UTZ Certified. This can notably be explained by the fact that this label can be found on the Douwe Egberts Group coffees sold in the vast majority of supermarkets, as well as on the majority of Delhaize brand coffees. Lidl has the highest share of sustainable coffee offering, accounting for 50% of its total selection. A general observation is the tendency for chains to develop more their own brand coffee.

For bananas we’ve observed the highest sustainability share in the premium brands, with Rainforest Alliance being the most prominent label. Lidl, only offering its own brand of bananas, is currently the only chain in which 100% of the bananas sold are certified sustainable.

All chains have improved their offer related to sustainable cocoa. Leading the field are the two discounters, Lidl and Aldi, respectively offering their customers 75% and 55% sustainable cocoa. UTZ is the most prominent label.

The labels on tea with the largest presence in Belgian supermarkets are Bio (organic) and Rainforest Alliance. With the exceptions of Aldi and Lidl, all stores visited had a proportional decrease of the number of certified tea products offered. As for coffee, there is a tendency for the chains to expanded their selection by adding their own brand products to it. With 42%, Delhaize has the highest share of certified tea on sale.

All of the chains have a relatively high sustainable cane sugar offering. The private labels of Colruyt, Delhaize, Intermarché and Lidl are 100% certified as sustainable. Products are predominantly certified Fairtrade.

Finally, rice constitutes the proportionally least well represented product category in supermarkets. Aldi, which only sells its own brand rice, is the chain with the largest sustainable rice offering with 32% certified organic and Fairtrade.

The two discounters, Aldi and Lidl, are the only chains to have made improvements in all of the 4 product categories studied in 2012 (coffee, bananas, tea and cocoa). On average, Aldi and Lidl have respectively recorded an improvement of 24% and 21% of the share of sustainable products offered. They are followed by Carrefour Market Mestdagh (+13.5%), Makro (+6%) and Carrefour (+5.5%). Intermarché and Delhaize have seen their results get slightly worse (-0.25% and -0,5% respectively), while Colruyt (-4%) and Spar (-11%) are the chains that have recorded the poorest results.

As previously mentioned, these figures do not take account of the various factors that could influence the results, such as range expansions or the end of a partnership with a label (e.g.: Mondelez).

Furthermore, some chains have chosen to sell own brand products that respect the “sustainability” criteria without bearing one or more of the labels certified by a third party such as those included within the context of this study.

Indeed, the cost of certification can be a deterrent for chains, as well as for small producers. Moreover, there are currently a multitude of sustainable labels which can cause confusion among consumers. Nevertheless, the most recognized label, and that which has the most demanding criteria in terms of sustainability, remains Fairtrade. Our study also revealed that this was the label that was most represented in Belgian supermarkets for the products studied. It is closely followed by the Bio label, followed finally by the UTZ Certified and Rainforest Alliance labels which come not far behind it. It should be pointed out that Rainforest Alliance has a greater presence with regard to premium brands than private labels, for bananas, tea and cocoa in particular.

Although the retail sector has an important role to play in promoting the consumption of sustainable products, the fact remains that awareness-raising and educating citizens on the manufacturing processes for the products studied are paramount. Fairtrade Belgium confirmed to us, during the interview, that the Fairtrade product offering is larger than demand in the Northern countries. Fairtrade’s objective is thus to ensure that this demand increases, in order to rebalance the relationship. This also pertains to cultural and geographical characteristics. Countries such as Great Britain, the Netherlands or Switzerland have markets that are significantly more open to sustainable products than Belgium.

1. http://www.biowallonie.com/wp-content/uploads/2016/05/Le-bio-en-chiffre-2015.pdf [↑](#footnote-ref-1)