



# Processed Meat, Seafood and Alternatives To Meat in Belgium

November 2025

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Declining volumes amid health and sustainability concerns

### INDUSTRY PERFORMANCE

Domestic preferences shape the evolution of the protein market

Chilled meat and seafood substitutes lead category growth

### WHAT'S NEXT?

Moderate growth, sustained by alternatives and reformulation

Plant-based innovation and natural claims to drive product development

Sustainability and innovation accelerate structural change

### COMPETITIVE LANDSCAPE

Private label consolidates leadership through affordability and innovation

Dynamic innovation in the plant-based segment

### CHANNELS

Supermarkets dominate but benefit from evolving private label strategy

E-commerce gains importance through convenience and premium positioning

### CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

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Staple Foods in Belgium - Industry Overview

## EXECUTIVE SUMMARY

Economic stability and evolving eating habits support steady growth

## KEY DATA FINDINGS

### INDUSTRY PERFORMANCE

Indulgence, local sourcing, and naturalness define consumer choices

Consumers balance wellness, value, and sustainability

Plant-based innovation and clean labels drive category evolution

### WHAT'S NEXT?

Naturalness and premium simplicity to guide future growth

Shifts in consumption patterns and retail dynamics

## COMPETITIVE LANDSCAPE

Artisanal producers retain leadership through quality and tradition

Innovation and sustainability drive growth in plant-based products

## CHANNELS

Supermarkets consolidate their leading role through flexibility and accessibility

E-commerce expands through convenience and premium differentiation

## MARKET DATA

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Table 25 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

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