



WP2 Flemish report
KULE
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The Context:

- The Flemish agri-food sector is focused on supplying the rich, urban Northwestern part of Europe with both processed and unprocessed high quality products—particularly pork, vegetables, beer and chocolate.
- Due to its urban character, farmers have been forced to intensify, that is, get more value added per hectare. The excellent location of Flanders has enabled this intensification through easy logistical access to inputs and knowledge. The Flemish agriculture and food sector is thus very export oriented. However, it has resulted in an agriculture that is heavily reliant on direct and indirect fossil energy use, and that pollutes land, air and water. Moreover, due to its intensive character land prices are very high, making it very difficult for farmers to convert to or start with organic or other forms of extensive farming.
- The emphasis is on product quality and taste, which is rooted in its Burgundese culture of good food and good life.
- Dominance of a strong neo-liberal discourse.
- Local initiatives have emerged in recent years in small niches (CSA's, Food teams, urban agriculture).



Multi-criteria matrix of food supply chain performance

Dimension	Economic	Social	Environmental	Health	Ethical
Sphere					
Public	Affordability	Support to the local economy Affordability	Energy Waste (Water) pollution	Food safety Healthy diets Taste	Authenticity Animal welfare Transparency
Scientific	Productivity		Energy Biodiversity & Land use	Healthy diets	
Market	Profitability & competitiveness Risk / Stability Productivity	Fair distribution of costs and benefits Labour satisfaction	Energy		Cultural identity Animal welfare
Policy	Price stability Productivity	Fairness	Transparency	Transparency Healthy diets	

Frameworks

Production-oriented:

It takes production and economic profit as its point of departure. Food safety, food quality, sustainability and innovation are considered as crucial aspects within this framework, because they guarantee economic growth and competitiveness of the food sector. The main players in this framework are Boerenbond, FEVIA (food industry), the Flemish government (department of agriculture), ILVO and several research institutes dealing with technological innovation in food production and food manufacturing, environment and bio-based economy as a whole.

Consumer-oriented:

In this approach the consumer is taken as the point of departure. Health, nutritional quality, food safety and affordability of quality food are key attributes.

Holistic-oriented:

It connects consumers and producers in the food chain with the societal and biophysical reality of the territory. This framework is reflected in emerging initiatives such as CSA, urban agriculture projects and Food teams.

Average scores of experts for each attribute

Attribute	Average score of experts
Affordability	6,6
Productivity	7,4
Profitability and competitiveness	6,6
Risk and stability	5,8
Support of the local economy	6,8
Fair distribution of costs and benefits	8,3
Labour satisfaction	7,0
Waste	7,2
Water pollution	7,7
Energy	8,0
Biodiversity and Land use	7,1
Transparency	8,0
Food safety	8,3
Healthy diets	7,0
Taste	7,2
Authenticity	7,2
Animal welfare	7,1
Cultural identity	5,7

Significant news and events



Concerns about the sustainability of our resource hungry system

Water pollution caused by nitrate emissions in the agricultural sector is a hot debated topic in the media, as it is the most pressing environmental issue related to the Flemish food system. Farmers, policy makers and environmental NGOs have often a very different opinion on this issue.



Farmers in global chains complain about an unfair distribution of costs and benefits and unstable prices.

Food safety is a crucial issue in Flanders since 'The dioxine crisis', a large food scandal in our country at the end of the 90's. At a fat melting company transformer oil was mixed with other fats. The dioxin contaminated stuff was processed in fodder and came thus in the food chain. This dioxin crisis led to the creation of the Federal Food Agency (FAVV). This agency is carrying out very severe controls. Food suppliers (at all levels of the food chain) are conscious about the necessity to invest in food safety.

