



Cooking Ingredients and Meals in Belgium

November 2025

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Cooking Ingredients and Meals in Belgium

EXECUTIVE SUMMARY

Good performance as unit prices stabilise

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Convenience and indulgence trends provide key growth drivers

Health and wellness positioning gains weight

Innovation helps to raise the profile of and stimulate interest in meal kits

WHAT'S NEXT?

Easing of economic pressures to engender a push-pull effect

Consumers to show sophistication in their product choices

Sunday opening to spur purchases of premium options

COMPETITIVE LANDSCAPE

Strong private label presence across cooking ingredients and meals

Lotus Bakeries creates dynamism through marketing and advertising

CHANNELS

Supermarkets remains the key channel despite growing competition

Retail e-commerce continues to develop and grow in cooking ingredients and meals

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Unit price dips benefit sales but cost concerns persist

INDUSTRY PERFORMANCE

Fall in the average unit price sees olive oil rebound in 2025

Olive oil leverages best health and wellness positioning to win consumers' favour

WHAT'S NEXT?

Faster retail volume over value (constant 2025 prices) growth as the average unit price drops

Shift to out-of-home activities to favour foodservice over retail volume growth

Natural/organic claims to gain importance

COMPETITIVE LANDSCAPE

Private label gains a competitive edge with a good price-quality ratio

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2025 DEVELOPMENTS

Hectic lifestyles fuel demand for convenient options

INDUSTRY PERFORMANCE

Chilled over frozen variants for quality and health and wellness reasons

Strong investment in food kits

WHAT'S NEXT?

Convenience and innovation to boost demand

Consumers to seek better quality, natural organic ingredients in their meals and soups

Chilled pizza to push foodservice volume sales growth

COMPETITIVE LANDSCAPE

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2025 DEVELOPMENTS

Indulgence and convenience trends fuel growth

INDUSTRY PERFORMANCE

Key health and indulgence trends spur sauces, dips and condiments

Company investments boost bouillon's performance

WHAT'S NEXT?

Limitations on retail growth amidst changing consumer behaviour

Local consumers to embrace international options

Naturalness and taste to drive health and wellness

COMPETITIVE LANDSCAPE

Unilever Belgium leads with a wide and popular brand portfolio

Barilla Alimentare launches novelties to add dynamism to the category

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Sweet Spreads in Belgium

KEY DATA FINDINGS

2025 DEVELOPMENTS

Healthy nut and seed based spreads appeal but other products suffer from high prices and unhealthy image

INDUSTRY PERFORMANCE

Health and wellness positioning drives nut and seed based spreads

Colruyt Group caters to both premium and economy demand with new launches

WHAT'S NEXT?

Slow rebound anticipated for chocolate spreads as cocoa prices drop from historical highs

Health and wellness to shape new product developments

Premiumisation trend to foster quality over quantity consumption

COMPETITIVE LANDSCAPE

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