



BELGIUM



Population: 10.3 million
Capital: Brussels (Bruxelles, Brussel)
Language: Dutch/French/German
Currency: Euro since January 1999
GDP per capita: \$36,265

WATER & WASTE WATER

The Belgian water treatment market is comprised of industrial and residential wastewater and drinking water treatment, and includes both equipment and services. Recently, the three regions of Belgium--Flanders, Wallonia, and Brussels--implemented major infrastructure projects and made considerable investments aimed at the treatment of virtually all wastewater by 2010. While the Belgian water treatment market is very developed with limited opportunities expansion, water and wastewater treatment equipment and supplies dominated the nearly \$500 million of U.S. environmental exports to Belgium in 2007. The best prospects for American companies are in equipment and supplies. It is recommended to approach the Belgian market through partnerships, strategic alliances and joint ventures with local firms.

The EU implemented the European Water Framework Directive in December of 2000 to protect public health and water sources. The general objective of the directive is to have surface and groundwater in a "good state" by the end of 2015. All member countries must comply with this directive. For more information visit: <http://europa.eu.int/scadplus/leg/en/s15005.htm>.

WASTE & RECYCLING

The ecological footprint of the average Belgian is 4.9 global hectares, 2.7 times the available space per person (1.8 ha). Of this amount, 0.95 ha comes from food production, 1.25 ha comes from accommodation, 0.95 ha comes from transportation and 1.75 ha comes from various waste streams—e.g., goods and services, health care, consumer consumption.



The Belgium environmental market is primarily engineering and service-oriented. Most companies provide environmental services in waste integrated management, wastewater treatment and soil remediation. The Belgian environmental market is undergoing much change currently, with the reorganization of the public waste sector, newcomers from Asia, industrial operators restructuring their operations, and a new government since June 2004. Household waste is managed by the public sector through regional and municipal authorities. The industrial waste market is managed by the private sector. However, pressures are now in play to privatize the household waste sector.

SOIL REMEDIATION

Soil may become polluted from a number of sources: industrial activity, agriculture, leaking fuel storage tanks, transport accidents, and more. All three regions undertake a similar approach to remediating soil issues. These steps include maintenance of a property registry of contaminated sites. The first step is a thorough investigation which can then be used to next determine if remediation is necessary and to what extent. The final stage is actual remediation activities. Property transfer laws have a significant impact on remediation. Soil investigations are mandatory upon property transfer. In the case where the private parties cannot agree to undertake remediation, local authorities reserve the right to step in to perform the necessary work.

The three regions and the federal government have in fact joined together to form a financing and soil remediation needs of petrol stations. In Flanders alone, OVAM estimates that there may be as many as 3,000 cases that need to be effectively and efficiently dealt with. In March 2004, a fund called BOFAS npo was created to handle the financing for petrol station clean up. Please visit their website, www.bofas.be, to learn more about the fund, to see how to register as a service provider and for up to date information on tenders. Technologies that do not require “dig and dump” and/or incineration may offer opportunities for soil remediation concerns due to limited landfill and incineration capacity.

INDOOR & OUTDOOR AIR POLLUTION

Two air quality areas are receiving significant attention in Belgium: 1) particulates, and 2) indoor air quality.

Particulates. As noted, the largest improvement with this category will come from attacking the largest source—diesel automobile engines. Technologies that can burn diesel more thoroughly, efficiently and effectively should see improving market opportunities in Belgium with the passage of the new EU Ambient Air Quality Directive. As the EU is heavily committed to biodiesel and biofuels, they have begun to address this issue. However, these alternate fuels are not without their own set of unique implications, such as increased NOX emissions from corn and rapeseed derived biofuels.

Indoor Air Quality. To date, the EU has not developed any specific directives for indoor air quality, but issues related to indoor health are now receiving much attention. Like most Europeans, Belgium citizens spend a significant amount of time indoors. Safety from typical indoor pollutants—benzene, radon, formaldehyde, household cleaning solvents, etc—will need attention. As the U.S. has been a leader in indoor air quality, U.S. product should see an advantage in serving this segment. Sensing devices, monitoring devices, and ventilation and filter systems should see opportunity in the area of indoor air quality. This is true for all indoor activity—from the home to workplace.

The following are Best Prospects for U.S. exports to Belgium

- Gas analyzers, gas separation equipment and gas meters
- Dust collection and purification devices
- Air emission monitors and analytical devices
- Alarm and emission warning devices
- Filtering and purification devices
- Gas sample preparation equipment
- Effective diesel fuel strategies, equipment, and technologies

TRADE EVENTS

IFEST, October 26-28, 2010 (every two years), www.ifest.be
BEST ENVIRONMENT, www.bestenvironnement.be
BEST takes place in Wallonia every alternate year, rotating with IFEST.

AVAILABLE MARKET RESEARCH

Water & Waste Water (2008)
Solid Waste and Recycling (2008)
Air Pollution Control (2008)

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