Country Profile
BELGIUM

Flanders & Wallonia · Access to Land · Land Markets · Generational Renewal

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~1.45M ha Total UAA (BE)	**~34,000** Farms total (2023/24)	**~50 ha** Avg. Farm Size (BE)	**62–66%** Land Leased

I. GENERAL AGRICULTURAL CONTEXT

Belgium's agricultural sector is divided across two regions with distinct characteristics: Flanders in the north — a highly urbanised, intensively farmed region — and Wallonia in the south, where farms are generally larger and organic farming is significantly more developed. Land policy has been a regional competency since 2014.

Farm Structure — Regional Comparison

Indicator	Flanders	Wallonia
UAA	720,000 ha	734,000 ha (44% of territory)
Number of farms	21,514 (2024)	12,423 (2023)
Avg. farm size	39.9 ha (2024)	59.3 ha (2023)
Farm loss since 1980/90	75,706 → 21,514 (-72%)	28,890 → 12,423 (-57%)
Land leased	58% (2020)	66% (2020)
Land owned by farmers	40% (2020)	34% (2020)
Public land	8.5% (~53,000 ha)	8%
Avg. land price	€66,288/ha (2024)	€29,216/ha (2023)
Organic % of UAA	1.6% (2022)	12% (2024)
Organic farms	636 (2023)	1,980 (15% of farms)
Avg. farmer age	56 years	55 years (2020)

Sources: Landbouwrapport Vlaanderen 2024; Statistica Wallonie 2023/24; Statbel

Land Use Distribution

In Flanders (2022): livestock farming (pastures + maize) dominates at 55%, followed by cereals (22%), potatoes (8%), vegetables (4%), sugar beets (3%), and fruits (3%).

In Wallonia (2023): cereals represent 34.7%, mixed cereals/cattle 10.9%, meat cattle 21.6%, dairy cattle 9.6%, and horticulture 10%.

Organic & Agroecological Farming

The contrast between the two regions is stark. Flanders has one of the lowest organic farming rates in Europe at just 1.6% of UAA (636 farms in 2023). Wallonia, by contrast, hosts 91% of all organically farmed surface in Belgium: around 90,583 ha (12% of UAA) and 1,980 certified organic farms — 15% of all Wallonian farms.

In both regions, organic sector breakdown shows similar patterns: vegetables (25%), arable farming (20%), livestock (16%), fruits (15%), mixed farms (14%).

The Flemish Ministry of Agriculture takes a deliberately neutral position, declining to favour agroecology over conventional farming. Wallonia faces persistent obstacles including widespread pesticide use and lack of dedicated transition funding. Both regions report that CAP eco-schemes fail to meaningfully distinguish between organic and conventional practice.

II. FARM SUCCESSION & GENERATIONAL RENEWAL

Age Profile & Succession Rates

57% Flanders: farmers 55+ with potential successor	**15%** Flanders: certain of having a successor	**22%** Wallonia: farmers 50+ with successor (2020)	**0.4** Wallonia: farm replacement rate (2022)

In Flanders, 57% of farmers aged 55 and above had a potential successor in 2023 — but only 15% were certain; 40% knew they had no successor. Smaller farms and non-dairy operations face the greatest succession challenges; dairy farms have the highest succession rates.

In Wallonia, only 22% of farmers over 50 had identified a successor in 2020. The farm replacement rate has fallen to 0.4 — meaning fewer than one new farmer enters for every two retiring — a deeply alarming figure. Dairy farming is declining rapidly; cereal farms show somewhat better succession prospects.

Support Measures for Young Farmers & New Entrants

- Flanders: Financial installation aid for young farmers; subsidised "Land Mobility" project run by the young farmers' organisation, matching retiring and incoming farmers (inspired by an Irish model).
- Flanders: Landwijzer trains new farmers in biodynamic principles; De Landgenoten supports new entrants by purchasing land on their behalf where possible.
- Wallonia: Financial installation aid for young farmers; government-supported succession project involving Terre-en-vue, the young farmer syndicate, and the peasant farming syndicate.
- Wallonia: Certain municipalities actively privilege young farmers with sustainable practices when allocating public land.

III. ACCESS TO LAND

Tenure Structure

Belgium has a predominantly leased farmland structure. In Flanders, 58% of agricultural land is leased; in Wallonia, 66%. Despite strong tenant protection in the legal framework, landlords are increasingly reluctant to sign long-term lease contracts — a paradox produced by regulations that protect tenants so strongly that owners prefer to avoid formal tenancy altogether.

Around 80% of agricultural land across Belgium is owned by natural persons. Corporate ownership data is almost entirely absent in both regions — neither Flanders nor Wallonia has established a comprehensive land observatory. Flanders launched a lease observatory in 2023 (part of the new lease decree); Wallonia created a land observatory in 2017, with a land bank potentially in development.

Land Prices & Market Dynamics

Land prices have risen dramatically — particularly in Flanders, where the average purchase price reached €66,288/ha in 2024, up from ~€20,500/ha in 2014 (a tripling in one decade). In Wallonia, the average was €29,216/ha in 2023, rising approximately 5% per year.

Key price drivers identified by member organisations:

- Flanders: Extreme urbanisation and spatial scarcity; proximity to cities and wealthy non-farming buyers (for gardens, horse paddocks, hobby animals). Soil quality has essentially no impact on price — location dominates entirely.
- Wallonia: No regulation of the land sales market; land price spikes of 20% when a lease contract ends, and up to 800% when land is reclassified from agricultural to residential or industrial use. Investors deliberately seek to break lease contracts to unlock price uplift.
- Both regions: Post-2008 financial crisis dynamics — investors seeking safe, tangible assets. Land supply is stable at around 2% of total farmland coming to market annually; rising demand against fixed supply drives prices upward.
- Agri-PV: Renewable energy investors are beginning to compete with farmers for land in both regions, distorting lease prices and threatening long-term agricultural use.

Notable Land Deals & Concentration

In Flanders:

- Investor Fernand Huts purchased 450 ha of public land from the City of Ghent in 2016, reportedly below market value. Legal proceedings by local farmers are still ongoing (2025).
- Colruyt Group (supermarket retailer): held 25 ha of agricultural land in 2016 — now 650 ha by 2024, actively expanding.
- The 50 largest landowners in Flanders (per 2016 leaked data) were predominantly nobility; largest agro-industrial holder was Clarebout, a potato processor with 300 ha.

In Wallonia:

- Colruyt Group actively purchasing in the province of Hainaut (570 ha total in Wallonia).
- 2023: Social Action Agency of the City of Liège acquired 102 ha of farmland.
- 2025: The Cancer Foundation acquired 45 ha.
- Several aristocratic families hold large undisclosed landholdings, linked to industrial companies including Carmeuse and Euronav (Savereys family, owner of the Greencap christmas tree investment company).

Shared warning: Corporate land accumulation

- Both De Landgenoten and Terre-en-vue flag a growing trend of large food-chain companies and financial investors accumulating agricultural land.
- Farmers increasingly risk becoming wage labourers rather than independent operators — reducing food sovereignty, soil stewardship, and local food supply.
- This trend is largely invisible due to the absence of mandatory land ownership reporting in both regions.

IV. LAND MARKET REGULATION

Legal Framework

Belgium has no regulation of the agricultural land sales market. All legislation focuses on the rental market. Since 2014, tenancy law has been a regional competency. Both regions have introduced recent reforms.

Key provisions of the Belgian tenancy framework (applicable to both regions, though now diverging):

- Minimum lease duration: 9 years, with automatic 9-year extensions unless terminated.
- Maximum rental prices: set by a coefficient applied to indexed cadastral income (based on 1975 rental values).
- Tenant pre-emptive rights: if land is sold, the sitting tenant has the first right to purchase.
- Lease inheritability: contracts pass to heirs of both tenant and landlord.
- Landlord termination: only under specific conditions (e.g. owner/close relative intends to farm personally), with 2 years' notice.

Flemish Reform: New Lease Decree (2023)

A new lease decree entered into force in November 2023, introducing a lease observatory to monitor market dynamics. The decree aims to make tenancy more accessible and flexible — but critics note that making leases easier to terminate may reduce farmer security.

- Career lease: landlord grants tenancy until tenant reaches age 65 (minimum 27 years); tenant must be under 38 at signing; income from career lease is tax-free for landlord.
- End-of-career lease (Wallonia): bridges the gap between the end of a regular lease and the tenant's retirement.
- In Wallonia (since January 2020): maximum of three 9-year extensions after the initial lease; after the third, lease ends unless tacitly renewed year-to-year.

Regulatory Gaps

- No regulation of the agricultural land sales market in either region.
- No mandatory land ownership reporting — corporate and investor accumulation is invisible to public authorities.
- No land control authority comparable to France's SAFER.
- In Wallonia: land management companies help investors obtain farmer status to access CAP subsidies and break lease contracts — exploiting legal definitions of "farmer".
- In Flanders: no land observatory as yet (only a lease observatory since 2023); no systematic monitoring of ownership concentration.
- Old farmers are not legally required to retire at 65 in Wallonia — land stays occupied longer, reducing availability for succession.

V. POLICY & POLITICAL CONTEXT

Recent Legislative Developments

Both regions have introduced lease law reforms, but face similar structural constraints: a Ministry of Agriculture in Flanders that views farming primarily as an economic sector and refuses to favour any farming model; and a Wallonian government that recently cut funding for Terre-en-vue's work supporting public authorities in sustainable land management.

EU CAP implementation in Belgium largely fails to incentivise agroecological transition. Eco-scheme thresholds are set so low that conventional farmers easily qualify, removing the distinctiveness of organic certification and actively discouraging new entrants from the organic sector.

Key Organisations

Organisation	Role & Position
De Landgenoten (Flanders)	Community land trust model; purchases land for agroecological farmers; advocacy for public land management reform
Terre-en-vue (Wallonia)	Community land trust; supports municipalities in sustainable land leasing; policy advocacy for land market regulation
Young Farmers Organisation (Flanders)	Runs the subsidised "Land Mobility" matching project for farm succession
Walloon Young Farmer Syndicate	Co-runs succession support programme with Terre-en-vue
Peasant Farming Syndicate (Wallonia)	Co-runs succession support programme; advocates for agroecological transition
Voedsel Anders / Food Sovereignty movement	Coalition including De Landgenoten; advocacy for agroecology and food sovereignty
Landwijzer (Flanders)	Trains new entrant farmers in biodynamic farming principles

VI. KEY BARRIERS & OPPORTUNITIES

Top Barriers to Land Access

- Rapidly rising land prices — driven by investor demand, urbanisation pressure, and speculative land banking, making purchase unaffordable for new entrants and small farms.
- Landlord reluctance to sign long-term leases — the very tenant protections designed to help farmers paradoxically reduce landlords' willingness to lease, shrinking the available rental market.
- Absence of network and market knowledge — particularly for new entrants without family farm backgrounds; informal relationships and local knowledge dominate access.
- Corporate land accumulation and investor strategies — investors using legal loopholes (fake farmer status, lease-breaking tactics) to acquire land and capture price uplift.
- In Wallonia: Farmers not required to retire at 65 — blocking land turnover and limiting succession opportunities.

Opportunities for Change

- Land market regulation (Agri-PV lever in Wallonia): Terre-en-vue sees opposition to agri-photovoltaic land conversion as a potential hook for introducing sales market regulation — a zone where land price distortion is acute and visible.
- Public land for public goods: Both regions identify local authorities as a key lever. Municipalities can choose to lease public land (8–8.5% of UAA) to young, agroecological farmers with sustainable practice criteria — bypassing the commercial market.
- Citizen–investor models: Community land initiatives (De Landgenoten, Terre-en-vue, BioBoden-type models) allow citizens to invest in land held outside the speculative market and leased to farmers at affordable rates.
- Land observatories: Flanders' new lease observatory (2023) and Wallonia's land observatory (est. 2017) are important transparency tools — a foundation for future regulation.
- Alliance with nature conservation, health, and anti-pesticide movements: Both organisations see cross-sector coalitions as essential to building political support for land reform.

VII. ADVOCACY & ALLIANCE PRIORITIES

De Landgenoten (Flanders)

- Sensitise local authorities against selling public land; advocate for community-benefit leasing criteria (agro-ecological production).
- Lobby Flemish government agriculture department for financial support for organic farming targets.
- Build alliances between city dwellers and farmers around shared concern over land financialisation.
- Develop citizen engagement and awareness campaigns; direct negotiation with politicians and cabinet.

Terre-en-vue (Wallonia)

- Lobby for land sales market regulation — the primary structural demand.
- Oppose agri-PV expansion on farmland as an advocacy lever for market regulation.
- Promote organic farming for public health and climate restoration; build cross-sector coalitions with health, nature, and anti-pesticide organisations.
- Legal campaigning — new strategic litigation dimension under development.
- Shift toward private funding to enable more independent policy opposition.

Shared EU-Level Priorities

- Regulation of land sales markets at EU level — both organisations support an EU framework comparable to France's SAFER model.
- Stronger CAP conditionality distinguishing organic from conventional — current eco-schemes blur the distinction and undermine transition.
- Transparency and reporting requirements for land ownership, especially corporate and investor holdings.
- Support for citizen land initiatives as recognised models for agricultural land governance.

VIII. KEY SOURCES

Landbouwrapport Vlaanderen 2024 (publicaties.vlaanderen.be)

landbouwcijfers.vlaanderen.be — Flemish agricultural statistics

Statbel — Belgian agricultural census data (statbel.fgov.be)

Statistica Wallonie — Wallonian agricultural data (2023/24)

Apache investigative journalism — land ownership data (apache.be/dossier/wie-bezit-vlaanderen, 2021)

JRC Report on Land Market Regulation in EU Member States — JRC126310 (publications.jrc.ec.europa.eu), 2021

De Landgenoten — internal research and advocacy data (delandgenoten.be)

Terre-en-vue — internal research and advocacy data (terre-en-vue.be)

ACCESS TO LAND
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