Belgium's trade relations with

POLAND

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Belgian
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TABLE OF CONTENTS

1 Importance of Belgium and the other EU countries in trade with Poland 2

1.1 Exports 2

1.2 Imports 3

2 Importance of Poland and its neighbouring countries for Belgium's foreign trade (2025) 4

3 Bilateral trade relations 5

3.1 Trade in goods 5

3.1.1 Exports 7

3.1.2 Imports 9

3.2 Trade in services 11

3.2.1 Exports 12

3.2.2 Imports 13

4 Economic indicators for Poland 14

5 Index of the unit price for imports and exports 15

6 Sources 16

7 Contacts 16

1 Importance of Belgium and the other EU countries in trade with Poland

1.1 Exports

Total exports of goods from the European Union (EU-27) to Poland accounted for about €269.9 billion in 2025. **Belgium represented a 5.7% share of this, making it the 6th most important EU exporter of goods to Poland.** Germany was by far the leading exporter of goods to Poland among all EU countries, with a 37.0% share and an export value of €99.9 billion. In addition, the Netherlands and Italy claimed second and third place in this ranking, with shares of 11.1% and 7.7%, respectively.

While European exports (EU-27) to Poland were 6.0% (€+15.3 billion) higher in 2025 than the previous year, Belgian exports grew at a slightly faster rate of 6.1% (€+883.2 million). Consequently, Belgium's share of EU goods exports to Poland increased marginally in 2025.

German exports of goods to Poland witnessed a rise of 7.3% (€+6.8 billion) in 2025 due partly to higher values for the subcategories 'video game consoles and machines', 'smartphones' and 'vehicles with only an electric motor for propulsion'. Furthermore, Dutch exports of goods to Poland grew by 9.7% (€+2.7 billion), partly because of increased exports of 'immunological products, put up in measured doses or in forms or packings for retail sale' and 'medicaments'. In addition, Italian exports of goods to Poland grew by 5.9% (€+1.2 billion), which can be attributed in part to higher values for the subcategories 'vaccines for human medicine', 'immunological products, put up in measured doses or in forms or packings for retail sale' and 'cocoa butter, fat and oil'.

Table 1: Evolution of exports to Poland

	In million €	2024	2025	Variation (in %)	Share (in %)
1	**Germany**	93,109.8	99,911.1	7.3	37.0
2	**Netherlands**	27,333.5	29,987.8	9.7	11.1
3	**Italy**	19,655.3	20,807.2	5.9	7.7
	…				
6	**Belgium**	14,434.3	15,317.5	6.1	5.7
	…				
	Total EU-27	**254,570.0**	**269,904.4**	**6.0**	**100.0**

1.2 IMPORTS

Total EU imports of goods from Poland amounted to about €260.5 billion in 2025. **Belgium was the 11th largest EU importer of goods from Poland in 2025 with a 2.8% share.** Germany was not only the number one exporter to Poland, but also the largest EU importer of goods from this country with a share of 37.9%, which corresponds to an amount of roughly €98.7 billion. The Czech Rep. and France claimed the second and third place in this ranking with shares of 8.2% and 6.8%, respectively.

While European Union (EU-27) imports of goods from Poland increased by 5.7% (€+14.0 billion) in 2025, Belgian imports from the country were up by only 0.6% (€+45.5 million). As a result, Belgium's share of EU goods imports from Poland decreased in 2025.

Partly due to a rise in imports of 'reciprocating piston engines of a kind used for the propulsion of vehicles of a cylinder capacity exceeding 1,000 cm^3', 'doors, windows and their frames and thresholds for doors of plastics' and 'dog or cat food, put up for retail sale', German imports of goods from Poland increased by 7.1% (€+6.5 billion) in 2025. Meanwhile, goods imported by the Czech Rep. from Poland grew by 5.5% (€+1.1 billion), which resulted in part from higher values for 'seats, whether or not convertible into beds, and parts thereof', 'products intended for inhalation without combustion containing tobacco or reconstituted tobacco' and 'parts and accessories of motor vehicles'. Furthermore, French imports of goods from Poland were up by 3.9% (€+656.1 million).

TABLE 2: EVOLUTION OF IMPORTS FROM POLAND

In million €		2024	2025	Variation (in %)	Share (in %)
1	**Germany**	92,162.6	98,692.4	7.1	37.9
2	**Czech Rep.**	20,224.8	21,333.2	5.5	8.2
3	**France**	17,029.9	17,686.0	3.9	6.8
	…				
11	**Belgium**	7,323.5	7,369.0	0.6	2.8
	…				
	Total EU-27	**246,511.6**	**260,516.0**	**5.7**	**100.0**

2 Importance of Poland and its neighbouring countries for Belgium's foreign trade (2025)

Client → Belgian exports

Supplier → Belgian imports

3 BILATERAL TRADE RELATIONS

3.1 TRADE IN GOODS

In 2025, Poland ranked **8th** among Belgium's main clients, before Sweden, but after Spain. Total Belgian **exports** of goods to Poland amounted to about **€15.3 billion** in 2025, which is **6.1%** (€+883.2 million) more than the previous year. In 2025, exports to Poland represented **3.0%** of the total amount of Belgian goods exported.

Poland was Belgium's **13th** largest supplier of goods in 2025, ranking after Switzerland, but preceding Norway.

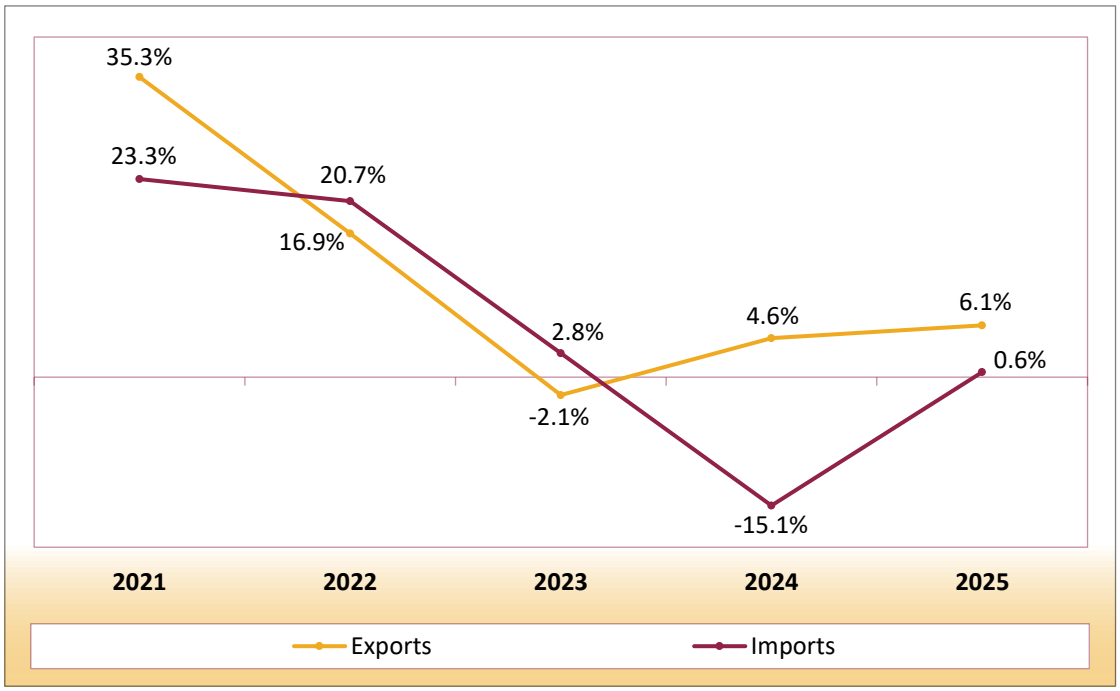
Total Belgian **imports** of goods from Poland were up marginally by **0.6%** (€+45.5 million), increasing to around **€7.4 billion** in 2025. Poland accounted for **1.5%** of total Belgian imports of goods.

TABLE 3: EVOLUTION OF BELGIUM'S TRADE IN GOODS WITH POLAND

In million €	2021	2022	2023	2024	2025
Exports	12,054.3	14,094.8	13,800.0	14,434.4	15,317.5
Imports	6,952.5	8,389.4	8,621.6	7,323.5	7,369.0
Trade balance	5,101.8	5,705.4	5,178.4	7,110.9	7,948.5
Exports: variation (in %)	35.3	16.9	-2.1	4.6	6.1
Imports: variation (in %)	23.3	20.7	2.8	-15.1	0.6

Belgium has traditionally recorded a **trade surplus in goods** with Poland. The surplus, which amounted to just over €5.1 billion in 2021, rose to around €5.7 billion a year later, as exports outpaced imports in both years. While imports continued to grow in 2023, exports declined, causing the trade surplus to narrow to just under €5.2 billion. The trend reversed in 2024, with exports increasing and imports declining. As a result, the trade surplus expanded to €7.1 billion. In 2025, both imports and exports increased; however, as exports grew more strongly, the trade surplus widened further, reaching over €7.9 billion - the highest level recorded during the period under review.

FIGURE 1: VARIATION OF EXPORTS AND IMPORTS (IN %)



In 2021 and 2022, Belgian **exports** to Poland grew by 35.3% and 16.9%, respectively, driven by higher values for transport equipment, chemical and pharmaceutical products, machinery and equipment, plastics, and base metals - the five largest product groups. While exports of transport equipment and machinery and equipment continued to increase in 2023, those of the three other aforementioned categories declined, resulting in an overall 2.1% decrease in total exports. Exports of transport equipment continued to grow in 2024 and 2025, and as the value of chemical and pharmaceutical products recovered during these two years from its slump in 2023, these two product groups had a significant positive impact on the overall evolution of total Belgian exports of goods to Poland. Consequently, exports rose by 4.6% and 6.1% in 2024 and 2025, respectively.

After increasing by 23.3% and 20.7% in 2021 and 2022, respectively, the growth rate of total Belgian **imports** of goods from Poland slowed to just 2.8% in 2023. In each of these years, higher values for machinery and equipment, transport equipment, and foodstuffs - the three largest product groups - were largely responsible for this growth. However, as imports of both machinery and equipment and transport equipment declined in 2024, total imports also fell, decreasing by 15.1%. Although both categories remained in decline in 2025, this was offset by higher values for foodstuffs and mineral products, among others, resulting in a modest 0.6% increase in total Belgian imports of goods from Poland.

3.1.1 Exports

In 2025, **transport equipment** took the leading position in total Belgian exports of goods to Poland. At around €3.3 billion, this group of products represented a 21.3% share of total exports. This section was mainly composed of 'vehicles, with both a spark-ignition internal combustion piston engine and an electric motor as motors for propulsion, other than those capable of being charged by plugging to an external source of electric power', 'vehicles with only an electric motor for propulsion' and 'road tractors for semi-trailers with only a compression-ignition internal combustion piston engine (diesel or semi-diesel)'.

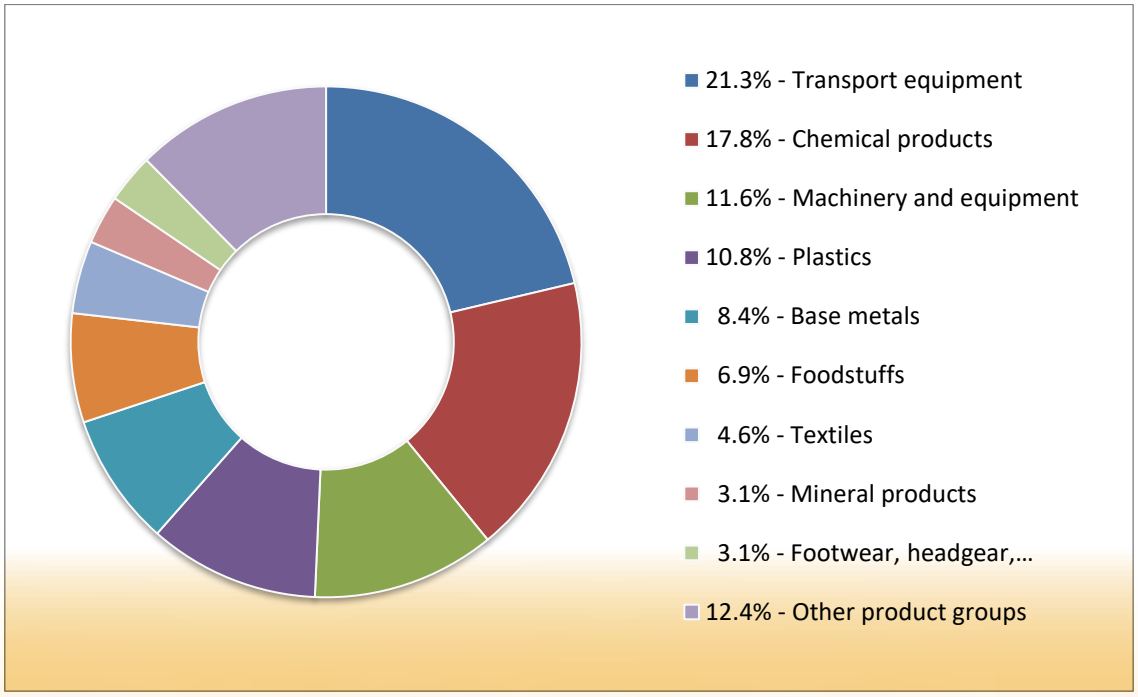
Exports of **chemical and pharmaceutical products** (main subsections: 'vaccines for human medicine', 'immunological products, put up in measured doses or in forms or packings for retail sale' and 'medicaments consisting of mixed or unmixed products for therapeutic or prophylactic uses') amounted to just over €2.7 billion, representing a 17.8% share.

Machinery and equipment (main subsections: 'manganese dioxide primary cells and batteries', 'spark-ignition reciprocating or rotary internal combustion piston outboard motors' and 'gears and gearing, other than toothed wheels, chain sprockets and other transmission elements presented separately; ball or roller screws; gear boxes and other speed changers, including torque converters') completed the top three of largest sections in exports of goods to Poland with a share of 11.6% and an export value of about €1.8 billion.

There were three other product groups that also accounted for a share of more than 5.0% of Belgian exports of goods to Poland. These sections were:

- **plastics**: €1.7 billion, corresponding to a share of 10.8%;
- **base metals**: €1.3 billion, corresponding to a share of 8.4%; and
- **foodstuffs**: €1.1 billion, corresponding to a share of 6.9%.

Figure 2: Breakdown of Belgian exports to Poland by principal commodities (in %) — 2025



The main reason for the 6.1% increase in total Belgian exports of goods to Poland was the higher value of **chemical and pharmaceutical products**. Exports in this category were up by €424.7 million (+18.5%) in 2025, which can be attributed to higher values for 'vaccines for human medicine' and 'immunological products'. Although the value of this category increased significantly, its export volume declined, mainly due to the 'potassium chloride' subcategory, which had only a limited impact on the overall value.

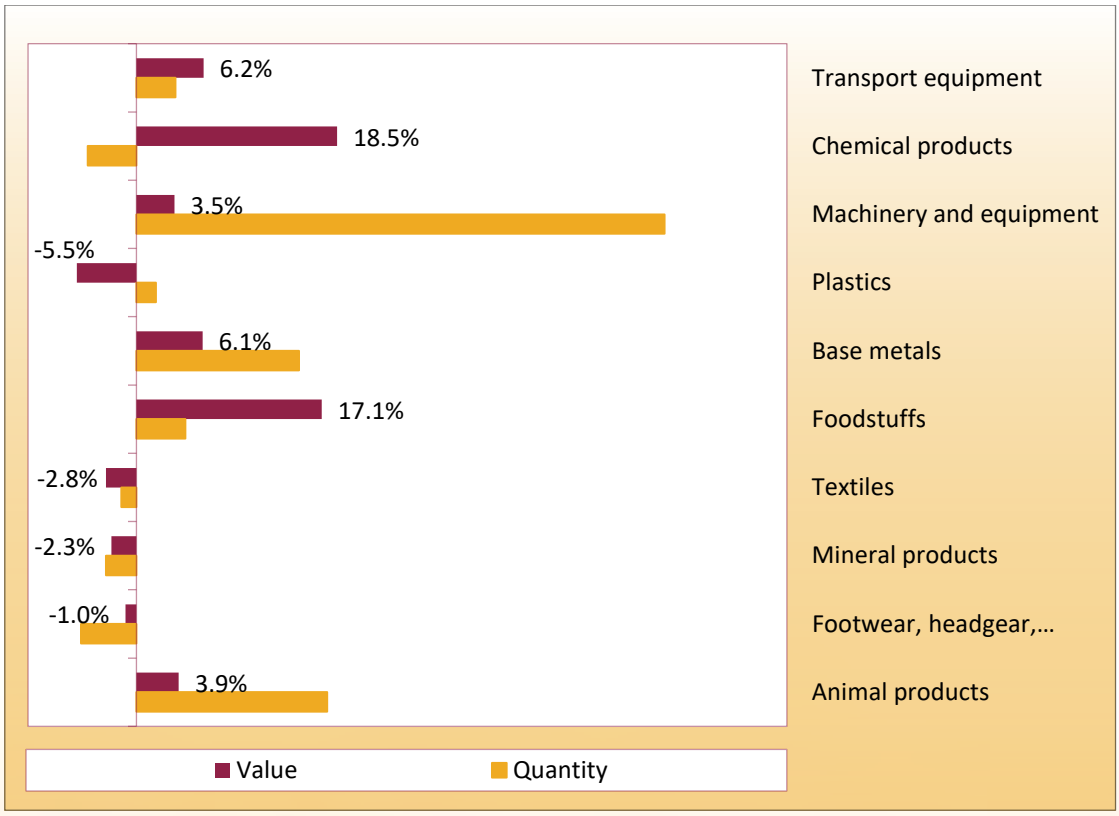
While the value of **machinery and equipment** was up by just 3.5% (€+60.7 million), the exported quantity soared. This growth can be attributed to the subcategory 'steam or sandblasting machines and similar jet projecting machines'. However, this particular subsection had very little impact on the overall value trend.

The category of **transport equipment**, the leading section in exports of goods to Poland, recorded a rise of 6.2% (€+189.5 million), due to the higher values of, among others, 'vehicles with only an electric motor for propulsion' and 'vehicles with both a spark-ignition internal combustion piston engine and an electric motor as motors for propulsion, capable of being charged by plugging into an external source of electric power'.

Animal products (+3.9%, or +€16.9 million), **base metals** (+6.1%, or +€74.1 million) and **foodstuffs** (+17.1%, or +€154.6 million) were the three remaining product groups from the top ten whose exports were up. The increase in exports of the latter group can mainly be attributed to the subsections 'tobacco, partly or wholly stemmed/stripped', 'chocolate and other food preparations containing cocoa' and 'not defatted cocoa paste'.

In contrast, the four product groups from the top ten whose export value decreased recorded negative growth ranging from 1.0% for **footwear, headgear,…** to 5.5% for **plastics**. The fall of €95.8 million in the latter product group can partly be attributed to the lower values of 'tubes, pipes and hoses, of vulcanized rubber (excl. hard rubber), reinforced or otherwise combined only with metal, without fittings', 'polyacetals, other polyethers and epoxide resins, in primary forms' and 'amino-resins, phenolic resins and polyurethanes, in primary forms'.

FIGURE 3: VARIATION OF EXPORTS TO POLAND BY PRINCIPAL COMMODITIES (IN VALUE AND QUANTITY) — 2025/2024



3.1.2 IMPORTS

In 2025, the **machinery and equipment** category, which was composed mainly of 'flywheels and pulleys, including pulley blocks', 'manganese dioxide primary cells and batteries' and 'automatic data-processing machines presented in the form of systems' took the top position in total Belgian imports of goods from Poland with around €1.4 billion, giving this group of products a share of 19.5%.

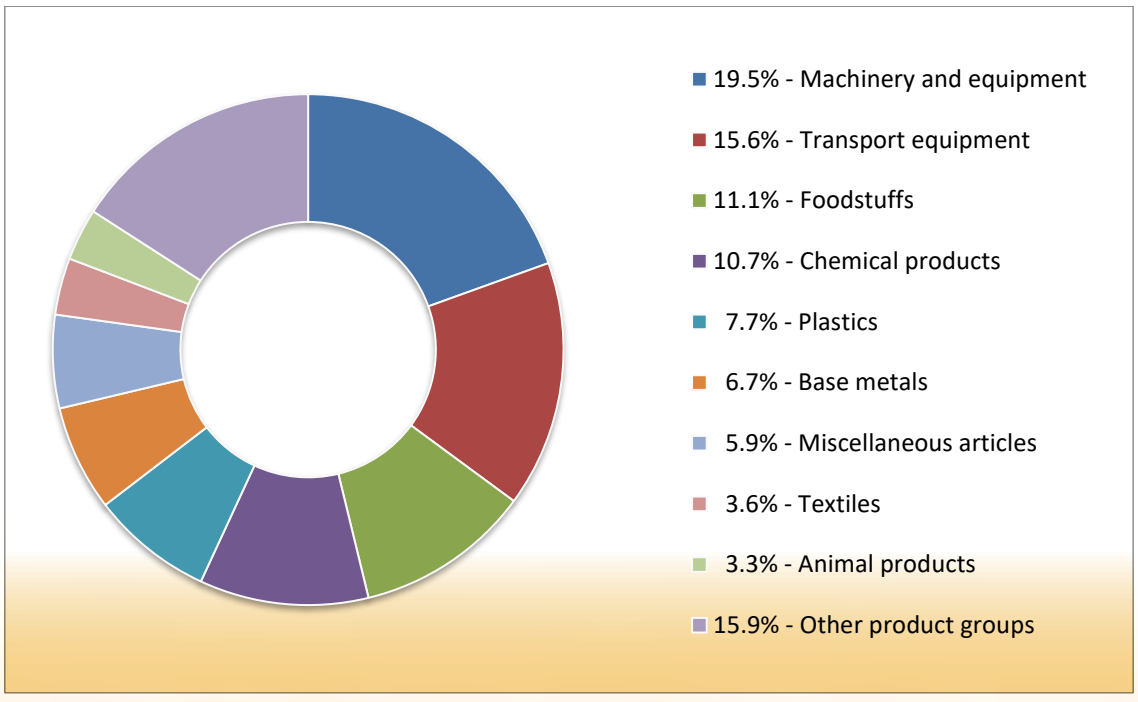
Transport equipment (main subsections: 'parts and accessories of motor vehicles', 'motor vehicles for the transport of goods with only a compression-ignition internal combustion piston engine (diesel or semi-diesel) of a gross vehicle weight not exceeding 5 tonnes' and 'road wheels and parts and accessories thereof') accounted for a 15.6% share of total imports, totalling about €1.2 billion.

The **foodstuffs** heading completed the top three of main sections in Belgian imports of goods from Poland. This group of products, which was mainly composed of 'bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa; communion wafers, empty cachets of a kind suitable for pharmaceutical use, sealing wafers, rice paper and similar products' and 'chocolate and other food preparations containing cocoa', accounted for a share of 11.1% and an amount of €820.4 million.

Four other product groups also accounted for a share of more than 5.0% of Belgian imports of goods from Poland. These sections were:

- **chemical and pharmaceutical products**: €789.9 million, corresponding to a share of 10.7%;
- **plastics**: €567.3 million, corresponding to a share of 7.7%;
- **base metals**: €495.0 million, corresponding to a share of 6.7%; and
- **miscellaneous manufactured articles**: €434.5 million, corresponding to a share of 5.9%.

FIGURE 4: BREAKDOWN OF BELGIAN IMPORTS FROM POLAND BY PRINCIPAL COMMODITIES (IN %) — 2025

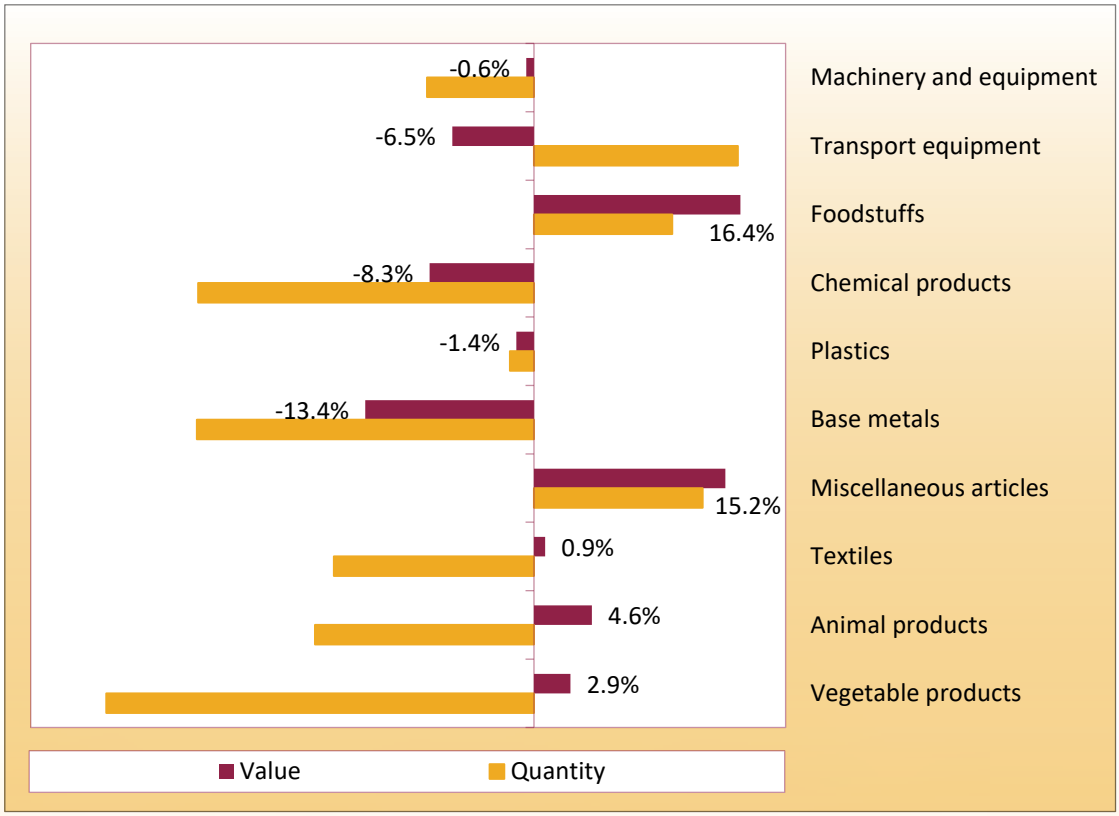


The 0.6% increase in total Belgian imports of goods from Poland in 2025 was mainly driven by the **foodstuffs** category, which grew for the fifth consecutive year - this time by 16.4%. The value of this category rose by €115.6 million, largely as a result of higher imports of 'bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa; communion wafers, empty cachets of a kind suitable for pharmaceutical use, sealing wafers, rice paper and similar products' and 'chocolate and other food preparations containing cocoa'.

Textiles (+0.9%, or €+2.3 million), **vegetable products** (+2.9%, or €+6.3 million), **animal products** (+4.6%, or €+10.8 million) and **miscellaneous manufactured articles** (+15.2%, or €+57.3 million) were the four other product groups among the top ten that recorded an increase in imports in 2025. The rise in the latter can be attributed, among other factors, to the subsections 'seats, whether or not convertible into beds, and parts thereof' and 'metal furniture'.

By contrast, the five product groups among the top ten that recorded a decrease in imports in 2025 reported negative growth rates ranging from 0.6% for **machinery and equipment** to 13.4% for **base metals**. The fall in the latter category, amounting to €76.8 million, can be attributed, among other factors, to the subsection 'structures and parts of structures (for example, bridges and bridge-sections, lock-gates, towers, lattice masts, roofs, roofing frameworks, doors and windows and their frames and thresholds for doors, shutters, balustrades, pillars and columns), of iron or steel; plates, rods, angles, shapes, sections, tubes and the like, prepared for use in structures, of iron or steel'. The fact that the imported quantity fell more than the value indicates that the unit price of these goods was higher in 2025 than in the previous year.

FIGURE 5: VARIATION OF IMPORTS FROM POLAND BY PRINCIPAL COMMODITIES (IN VALUE AND QUANTITY) — 2025/2024



3.2 TRADE IN SERVICES

The value of Belgian exports of services to Poland was down marginally by **0.3%** (€-5.9 million) in 2025, decreasing to about **€1.7 billion**. This made Poland Belgium's **13th** largest client, after Denmark but before Austria with a share of **1.2%** of total Belgian exports of services.

Belgian imports of services from Poland accounted for a value of roughly **€3.1 billion** in 2025, corresponding to a **4.2%** (€+124.1 million) increase compared to the year before. Poland was Belgium's **11th** largest supplier in 2025 with a share of **2.1%** of our country's total imports of services, ranking before Sweden, but after Italy.

TABLE 4: EVOLUTION OF BELGIUM'S TRADE IN SERVICES WITH POLAND

In million €	2021	2022	2023	2024	2025
Exports	1,408.1	1,575.3	1,649.6	1,715.4	1,709.5
Imports	1,989.0	2,207.9	2,688.7	2,927.9	3,052.0
Trade balance	-580.9	-632.6	-1,039.1	-1,212.5	-1,342.5
Exports: variation (in %)	18.6	11.9	4.7	4.0	-0.3
Imports: variation (in %)	5.0	11.0	21.8	8.9	4.2

As Belgium's exports of services to Poland remained consistently below its imports from 2021 to 2025, the services balance with this country was in deficit for Belgium throughout the period.

The deficit in Belgium's **services trade balance** with Poland amounted to €580.9 million in 2021 and subsequently increased to €632.6 million a year later, as import growth outpaced that of exports. The same trend continued in 2023 and 2024, with imports growing more rapidly than exports each year. As a result, the deficit widened to just over €1.0 billion in 2023 and €1.2 billion in 2024, respectively. While exports declined slightly in 2025, imports continued to grow for the fifth consecutive year, causing the deficit to exceed €1.3 billion - the highest level recorded during the period under review.

The services balance thus contrasted with the goods balance over the period 2021–2025, as the latter has traditionally been in Belgium's favor.

3.2.1 EXPORTS

In 2025, the **other business services** section led total Belgian exports of services to Poland with a value of €566.2 million and a 33.1% share. This category includes 'merchanting', 'operational leasing services', 'legal services', 'accounting, auditing, bookkeeping, and tax consultancy services', 'advertising, market research, and public opinion polling' and 'waste treatment and depollution'. **Telecommunications, computer, and information services** took second place with a 25.1% share, while the **travel services** section completed the top three with a 16.7% share.

The lower value of **travel services** contributed to a 0.3% decline in total Belgian exports of services to Poland in 2025. Exports in this category fell by 12.3% (€40.1 million) to €286.0 million, indicating reduced spending by Polish tourists and businesspeople during their stays in Belgium.

Furthermore, exports of **transportation services** were down by 6.1% (€-14.3 million). This category includes all services provided by residents of one economy to residents of another economy that involve the transport of persons, the movement of goods (freight), the rental (charter) of vehicles with crew and related support services.

The negative evolution of these two service categories, together with the **other remaining services** (-6.7%, or €-11.8 million), offset the rise in exports among the three other service groups from the top five. While the increase of **telecommunications, computer and information services** was limited to 0.6% (€+2.7 million), exports of **other business services** were up by 11.0% (€+56.2 million). Furthermore, the value of **insurance services** - which cover the provision of various types of insurance to non-residents by resident enterprises, and vice versa - grew by 3.2% (€+1.4 million).

TABLE 5: BELGIAN EXPORTS TO POLAND BY PRINCIPAL SERVICES

In million €	2024	2025	2025/2024 Var. (in %)	2025 Share (in %)
Other business services	510.1	566.2	11.0	33.1
Telecommunications, computer and information services	427.2	429.9	0.6	25.1
Travel services	326.1	286.0	-12.3	16.7
Transportation services	234.2	219.9	-6.1	12.9
Insurance services	43.7	45.1	3.2	2.6
Other remaining services	174.1	162.3	-6.7	9.5
Total	**1,715.4**	**1,709.5**	**-0.3**	**100.0**

3.2.2 IMPORTS

The **transportation services** section, which includes sea transport, air transport, rail transport, road transport and inland waterway transport, was the largest category in Belgian **imports** of services from Poland, with a value of just over €1.1 billion and a 36.2% share. **Other business services** and **telecommunications, computer and information services** completed the top three with shares of 34.7% and 9.4%, respectively.

The higher values for **transportation services** and **other business services** were the main reasons why total Belgian imports of services from Poland grew by 4.2% in 2025. Imports of the former section recorded a 4.6% (€+48.9 million) increase. Meanwhile, the value of the latter category grew by 7.4%, from €986.4 million to around €1.1 billion.

Meanwhile, imports of **construction services**, which were good for €228.3 million in 2024, rose by 1.8% in 2025 to €232.4 million. These services cover the creation, management, renovation, repair or extension of fixed assets in the form of buildings, land improvements of an engineering nature and other constructions such as roads, bridges and dams. It also includes related installation and assembly work, site preparation and general construction as well as specialized services such as painting, plumbing and demolition.

Furthermore, imports of **telecommunications, computer and information services** grew by 2.8% (€+7.8 million) to €286.6 million.

The increase in imports across each of the four aforementioned services categories was more significant than the decline in imports of **travel services** (-1.1%, or €-1.3 million) - indicating reduced spending by Belgian tourists and businesspeople during their stays in Poland - and in the **other remaining services** (-3.3%, or €-8.5 million).

TABLE 6: BELGIAN IMPORTS FROM POLAND BY PRINCIPAL SERVICES

In million €	2024	2025	2025/2024 Var. (in %)	2025 Share (in %)
Transportation services	1,056.6	1,105.5	4.6	36.2
Other business services	986.4	1,059.4	7.4	34.7
Telecommunications, computer and information services	278.8	286.6	2.8	9.4
Construction services	228.3	232.4	1.8	7.6
Travel services	122.0	120.7	-1.1	4.0
Other remaining services	255.9	247.4	-3.3	8.1
Total	**2,927.9**	**3,052.0**	**4.2**	**100.0**

4 Economic indicators for Poland

Economic structure (2025 - estimates)	
GDP	€922.9 billion
GDP growth rate	3.6%
Inflation rate	3.6%
Exports of goods (FOB)	€366.5 billion
Imports of goods (FOB)	€372.7 billion
Trade balance	€-6.2 billion
Population	36.5 million
Unemployment rate	3.1%
Main clients (2025): % of total	
Germany	26.9
Czech Rep.	6.2
France	6.0
Main suppliers (2025): % of total	
Germany	25.5
China	10.0
Netherlands	6.8
Main exports (2025): % of total	
Parts and accessories for tractors, motor vehicles for the transport of ten or more persons, motor cars and other motor vehicles principally designed for the transport of persons, motor vehicles for the transport of goods and special purpose motor vehicles	4.9
Automatic data-processing machines and units thereof; magnetic or optical readers, machines for transcribing data onto data media in coded form and machines for processing such data, n.e.s.	2.3
Furniture and parts thereof, n.e.s. (excl. seats and medical, surgical, dental or veterinary furniture)	1.8
Main imports (2025): % of total	
Motor cars and other motor vehicles principally designed for the transport of persons, including station wagons and racing cars	5.0
Petroleum oils and oils obtained from bituminous minerals, crude	3.2
Parts and accessories for tractors, motor vehicles for the transport of ten or more persons, motor cars and other motor vehicles principally designed for the transport of persons, motor vehicles for the transport of goods and special purpose motor vehicles	3.0

Sources: IMF + International Trade Centre

5 INDEX OF THE UNIT PRICE FOR IMPORTS AND EXPORTS

The table below gives an overview of the development of the index of the unit price for imports and exports for Belgium (with the world).

This index facilitates an analysis of the general development of the price of goods. This makes it possible to consider the global development of Belgian imports and exports in perspective by determining the part that is caused by price developments (and hence which part is caused by a change in quantity).

The table has to be interpreted as follows:
If a given product had an export value of €100 in the year 2021, then this product had an average value of €122.2 in 2025. The same principle applies to imports. If a particular product had an import value of €100 in 2021, the same product then had an import value of €122.2 in 2025.

TABLE 7: INDEX OF THE UNIT VALUE OF TOTAL BELGIAN EXPORTS AND IMPORTS (2021=100)

	Export	Import
2016	80.3	78.1
2017	84.7	83.8
2018	87.9	88.7
2019	89.9	91.2
2020	89.9	89.0
2021	100.0	100.0
2022	126.9	129.2
2023	119.6	118.6
2024	119.5	120.0
2025	122.2	122.2

6 Sources

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CIA World factbook — www.cia.gov

Directorate-General Commerce, European Commission — http://ec.europa.eu/trade

Eurostat, European Commission — http://ec.europa.eu/eurostat

World Trade Organization — www.wto.org

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