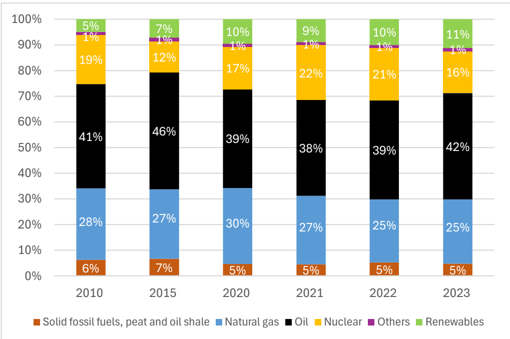
![European Commission]

State of the Energy Union 2025: Belgium

Key energy figures

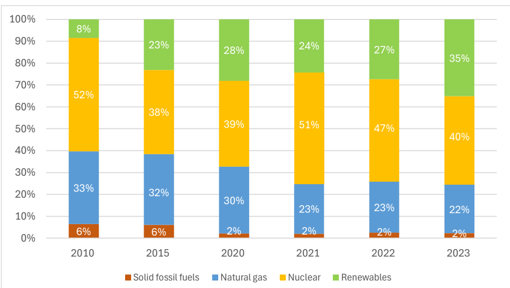
Graph 1: **Energy mix**



The 2023 gross inland energy consumption was 2 million TJ. (3.8% of the total EU consumption).

Source: Eurostat

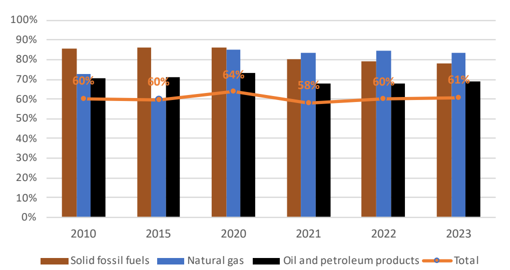
Graph 2: **Electricity mix**



The 2023 gross electricity production was 80.2 TWh (3% of the total EU production).

Source: Eurostat

Graph 3: **Import dependency on fossil fuels**

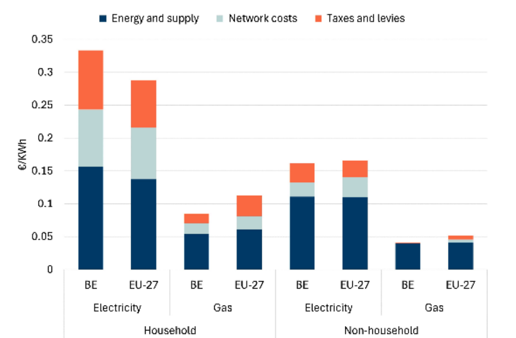


Source: Eurostat

Affordable energy

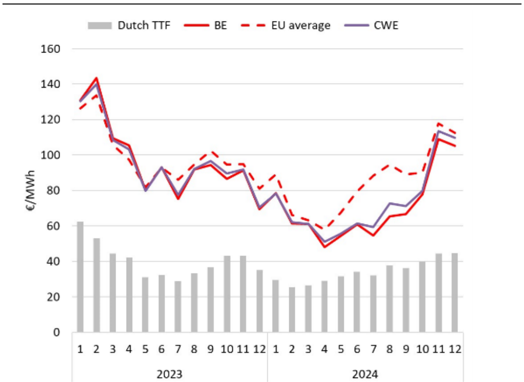
- **2024 household prices for electricity dropped 18% year-on-year** but remained above the EU average, the fourth highest in the EU. **Gas prices dropped by more than 20%** for both household and non-household consumers and were 24% and 20% below EU average, respectively.
- Thanks to a **significant share of renewables** (35.8%) **and nuclear** (42) % in its electricity mix, wholesale electricity prices in Belgium **averaged 70.3 EUR/MWh** in 2024, **below the EU average** of 84.7 EUR/MWh.

Graph 4: **Retail energy price components for household and non-household consumers, 2024**



Source: Eurostat

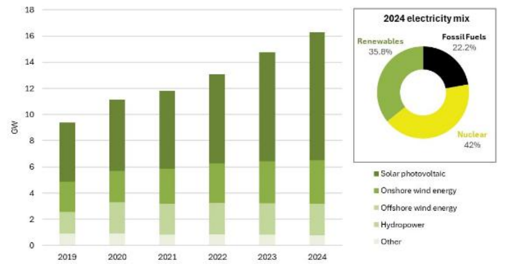
Graph 5: **Monthly average day-ahead wholesale electricity prices and European benchmark natural gas prices (Dutch TTF)**



Source: S&P Platts, ENTSO-E

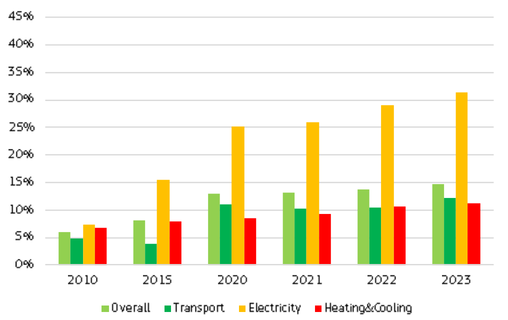
Decarbonisation, electrification and climate action

Graph 6: **Belgium's installed renewable capacity (left) and electricity generation mix (right)**



"Other" includes renewable municipal waste, solid biofuels, liquid biofuels, and biogas.
Source: IRENA, Ember

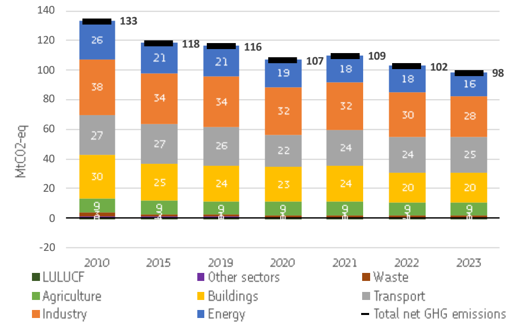
Graph 7: **Share of renewable energy sources**



In % of gross final consumption of energy.
Source: Eurostat

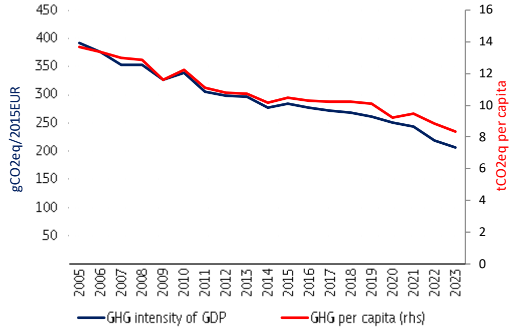
- **In 2023, electricity accounted for 21.3% of final energy consumption (FEC) (below the EU average of 22.9%)** and this share has remained largely stagnant in the last decade. Electricity accounts for 19.6% and 31.1% of households' and industry's FEC respectively. For the transport sector, this share remains negligible at 2.5%.
- In 2024's second semester, Belgium had some of the highest **household** electricity prices in the EU, with the **third highest electricity-to-gas price ratio**. For **energy-intensive industries**, **electricity cost 3.8 times more** per unit than gas.

Graph 8: **Greenhouse gas emissions by sector**



Source: Greenhouse gas inventory 1990-2023 (EEA)

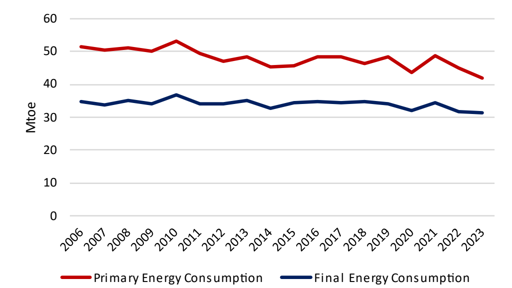
Graph 9: **GHG per capita and GHG intensity of GDP**



Source: Greenhouse gas inventory 1990-2023 (EEA). Real GDP in 2015-prices (AMECO, European Commission). Population (Eurostat).

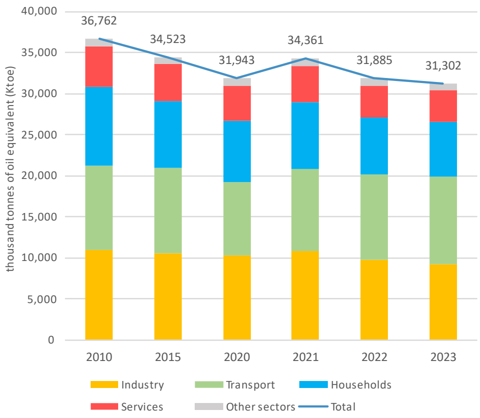
Energy efficiency

Graph 10: **Primary and final energy consumption**



Source: Eurostat

Graph 11: **Final energy consumption by sector**



Source: Eurostat

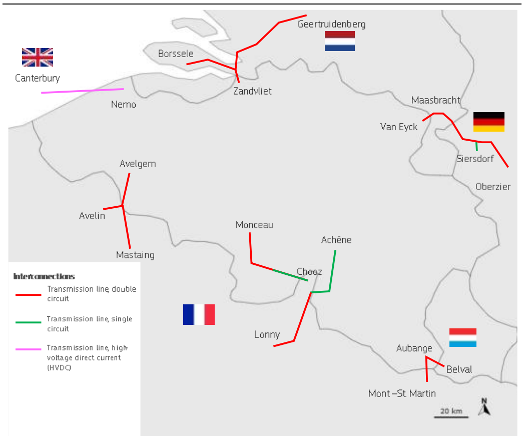
Integrated energy market

Table 1: **Electricity interconnectivity**

2025	2030 targets
13.5 %	At least 15%

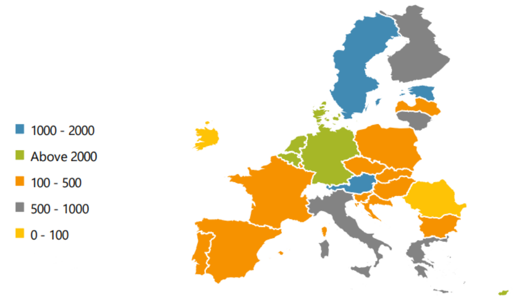
Source: European Commission's own calculations based on the ENTSO-E Winter Outlook 2024-2025 data

Map 1: **Cross-border electricity infrastructure**



Source: DG ENER map recreation (based on ENTSO- E)

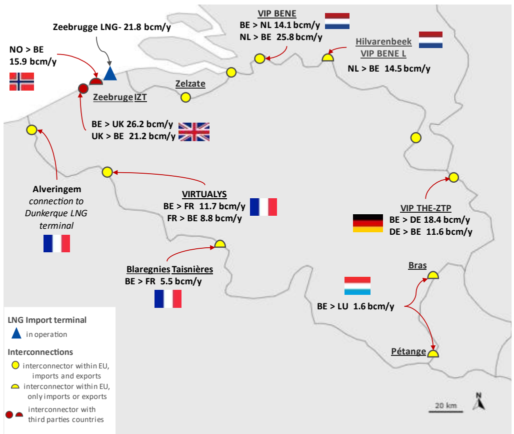
Map 2: **Per capita cumulative investments into transmission infrastructure between 2024-2040 (€$_{2024}$ billion/year per capita)**



Source: DG ENER, 2025, *Investment needs of European energy infrastructure to enable a decarbonised economy*, Europa.eu

Security of supply

Map 3: **Cross-border gas infrastructure**



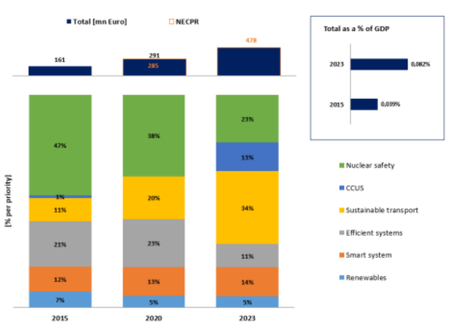
Source: DG ENER map recreation (based on ENTSO- G)

- **Belgium has taken steps to comply with European sanctions on Russian energy imports. As part of its efforts, Fluxys LNG has developed a mass balance system to track the origin of LNG.** This move is in line with the EU's sanctions package aimed at restricting LNG transshipments from Russia. The Belgian government has also introduced regulations to ensure compliance with these sanctions. A Royal Decree was issued to provide guidelines for shippers, outlining the rules they must follow. Additionally, the Zeebrugge terminal has implemented a policy change, effective from 27 March 2025, regarding the handling of Russian LNG. ([1])

([1]) www.fluxys.com/en/natural-gas-and-biomethane/activities/lng/implementation-of-the-14th-eu-sanctions-package.

Research, innovation and net-zero technologies

Graph 13: **Public investment in Energy Union R&I priorities**



Difference between reported NECPR data and SETIS data due to exchange rate conversion differential, encoding error, partial or inconsistent scope of reporting between IEA and NECPR by MS.
Source: JRC SETIS 2025

- **Venture capital investment in net-zero energy technology** (start-ups and scale-ups) **reached EUR 196,6 million in 2024**[2], up from EUR 52,8 million in 2023[3]. These investments were mainly directed toward renewable energies (59%), grid technologies (18%) and built environment (9%).

Table 2: **Key descriptive statistics for net-zero technologies in Belgium**

	Manufacturing Capacity (% of EU-27 capacity)	Additional announced capacity 2024-25	Additional announced capacity 2026 onwards	Industrial production % of EU-27 (component disclosure rate)[45]	Import dependence (extra-EU)[46]
	100 – 150 MW/y[47] *(1% of EU capacity)*	-	-	«Negligible portion of EU production» *(Disclosure: 54%)*	0.41
	At least three facilities identified[48]	-	-	Insufficient data coverage *(Disclosure: 47%)*	0.07
	At least one facility identified[49]	-	2900 - 3200 MW/y	«Negligible portion of EU production» *(Disclosure: 77%)*	0.33
	At least three facilities identified	-	-	«Negligible portion of EU production» *(Disclosure: 71%)*	0.28
	250 – 650 MW/y *(4 - 11% of EU capacity[50])*	-	900 - 1100 MW/y	Insufficient data coverage *(Disclosure: 37%)*	0.04
	N/A	N/A	N/A	1% *(Disclosure: 56%)*	0.14
	N/A	N/A	N/A	1% *(Disclosure: 45%)*	0.43
	N/A	N/A	N/A	1% *(Disclosure: 65%)*	0.26

Source: DG ENER, 2025, *The net-zero manufacturing industry landscape across the Member States*, Europa.eu.

Key EU funding mechanisms

Recovery and Resilience Plan

- **Total amount: EUR 5.3 billion**
- Amount allocated for energy: EUR 1.76 billion, supporting mainly energy efficiency in buildings (EUR 1.21 bn), hydrogen (EUR 351.8 mn) and energy networks and infrastructure (EUR 195 mn).
- **Climate tagging: 49.2 %**; REPowerEU chapter: 87.8%.

Social Climate Plan

- **Maximum financial allocation: EUR 1.66 billion** (2.55% of the total SCF allocation).
- As of today, **Belgium has not submitted its final SCP yet** to the European Commission.

Cohesion Policy Funds

- **Estimated amount allocated to support energy (4): EUR 812 million**, supporting mainly efficiency in buildings (EUR 320 mn) and energy efficiency in industry (EUR 242 mn).

MFF 2028-2034 (proposal) (5)

- According to the European Commission proposal, the largest budget component (44% of the budget, EUR 865 billion) would be allocated for one single performance-based fund, accessible to Member States via National and Regional Partnership Plans (NRPPs), **with a dedicated 43% climate and environment target.**
- Total allocation for Belgium as part of the foreseen **National and Regional Partnership Plans (6)** would amount to **EUR 8.8 billion**.

European Semester 2025

- **Country-Specific Recommendation (Energy)**:
- ***Reduce overall reliance on fossil fuels***, *including by stepping up energy efficiency improvements and reducing fossil fuel use in buildings, and by further incentivising industry to decarbonise.*
- ***Accelerate the roll-out of renewable energies and upgrade grid infrastructure*** *by further streamlining permitting procedures, by adopting legal frameworks to boost investment in renewable energy installations and by facilitating energy sharing.*
- ***Take specific steps to phase out fossil fuel subsidies,*** *in particular in the transport and heating sector, including by shifting excise duties from electricity to fossil fuels.* (7)

2 A standout big deal by Ecostal Group a developer of photovoltaic energy systems, which raised EUR 100 million of venture funding through a combination of of equity and debt.

(3) JRC elaboration based on PitchBook data (05/2025).

(4) Not including eventual amendments triggered by the mid-term review.

(5) EU budget 2028-2034

(6) COM(2025) 565 final.

(7) Further information: 2025 Country Reports