BKV
Belgische Kamer der Verhuizers

An initiative of BKV – de Belgische Kamer der Verhuizers.

The removals industry & sustainability:

a basis for all Belgian removals firms.

Sustainability report

2023

Introduction by the chairman of BKV

Dear movers,

The European Commission recently presented its Competitiveness Compass, which sets out policy priorities for the next five years. One of the spearheads is the simplification of European sustainability regulations and the protection of smaller companies from excessive reporting obligations. This is a crucial development for the Belgian relocation sector, in which the majority of companies are small and medium-sized enterprises (SMEs).

Many moving companies, despite not being legally obliged to report on sustainability, still face a growing administrative burden. This is due to the so-called trickle-down effect: large companies, which do have to comply with strict reporting requirements, ask their SME suppliers for extensive sustainability information. This leads to moving companies often having to complete multiple, complex questionnaires for their customers, which is time-consuming and administratively burdensome.

The Belgian Chamber of Removers (BKV) recognised this problem and developed a concrete solution: a standardised, simple template that allows any moving company to report on sustainability in an efficient way. This template allows SMEs to meet their customers' expectations quickly and easily, without excessive administrative effort. At the same time, it makes comparison of sustainability efforts easier and more transparent for customers.

This initiative fits perfectly with European plans to streamline regulations and ease the reporting burden for SMEs. The Belgian Chamber of Removers is therefore proud of this sectoral approach, which not only reduces administrative burdens, but also ensures a more uniform and accessible way of sustainability reporting within the moving industry.

With this solution, we ensure that even the smallest SME in the relocation industry can demonstrate how it contributes to a more sustainable future, without excessive red tape. A win-win for all parties involved.

Kind regards,

Bertil Durieux
President, Belgian Chamber of Removers

Koen Vangoidsenhoven
Director, Belgian Chamber of Removers

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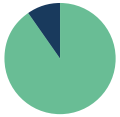
1. The Belgian removals industry in numbers

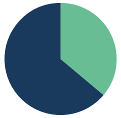
To get a good picture of the Belgian removals industry, we present a brief overview of key figures. These figures include both economic and sustainability indicators to create a complete picture of the sector.

1.1 The removals industry in numbers

Total number of employees within the removals sector



- **Number of men:** 3055
- **Number of women:** 320



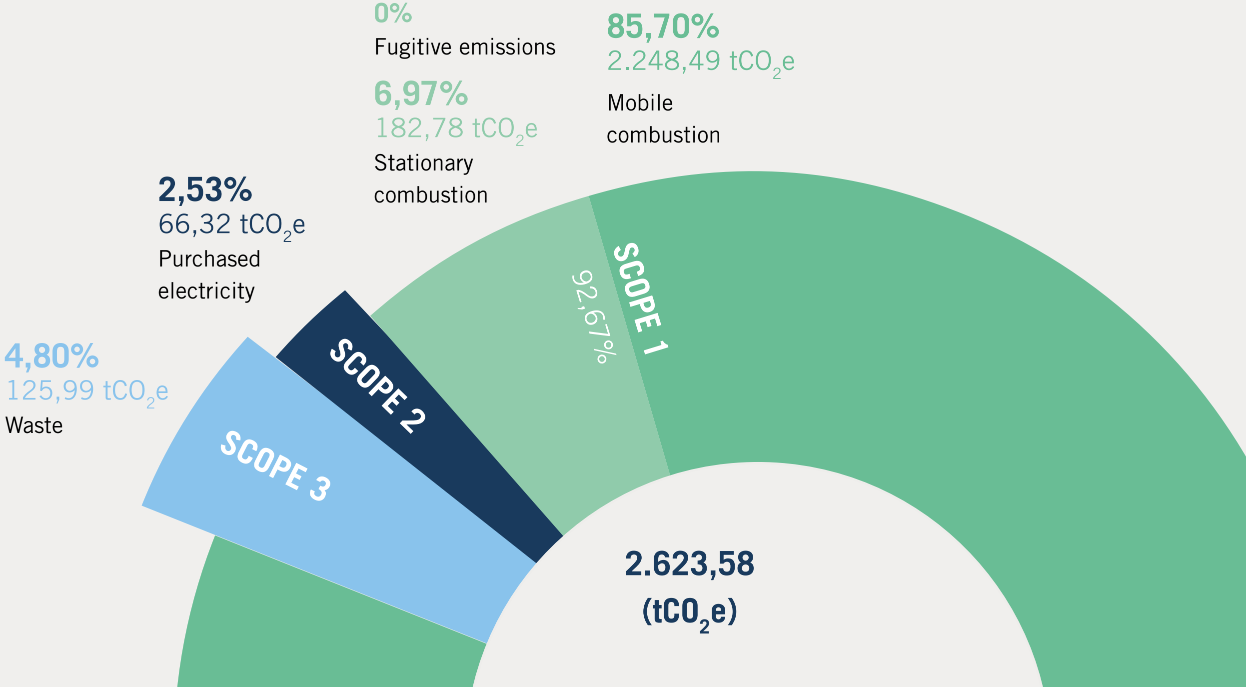
- **Number of S-cards:** 1321
- **Number of P-cards:** 2336[1]

Gross margin

- **€ 66.498.023[2]**

Sustainability figures [3]

- **Scope 1 & 2 emissions in the removals industry: 2.497,59 tCO_2e[4]**
  - Total Scope 1: 2.431,27 tCO_2e
  - Total Scope 2: 66,32 tCO_2e
- **Carbon intensity: 0,62 tonnes of CO_2e per EUR 10 000 turnover (based on 48,436,582.56 total turnover)**
- **Total amount of waste: 6.506,86 tonnes[5]**
  - Commercial waste: 5.287,75 tonnes (residual waste, PMD, paper and cardboard)
  - Waste by customer: 1.219,11 tonnes
- **Total energy consumption (fossil fuels and electricity): 10.994,62 MWh**
- **Total training hours by Ambassador: 2716 hours[6]**



1.2 Our priorities

Our planet
Environment

The moving sector has an important role to play in reducing environmental impact and contributing to a more sustainable future. Therefore, we are committed to the following key priorities:

- **Net Zero by 2050**, in line with EU targets.
  - Short-term actions:
    - Switch to HVO/biodiesel as a more sustainable alternative to fossil fuels.
    - Commit to technological innovation to reduce emissions in the transport sector.
    - Use of green electricity in offices and warehouses to reduce carbon footprint.
- **Offsetting** hard-to-reduce emissions through sectoral projects and carbon offset initiatives.

Our people
Social

Our industry is all about people. That is why we are strongly committed to safety, training and good working conditions:

- **Minimum workplace accidents** through prevention and awareness.
- **Training employees** to better prepare them for physical and ergonomic risks.
- **At least two training days** per year per employee to enhance safety and professional competence.
- **Invest in ergonomic materials and equipment** to reduce the physical strain on movers.

Our management
Governance

Transparency and fair competition are essential for a sustainable moving industry. That is why we are taking concrete actions:

- **Combating social fraud, false self-employment and illegal subcontracting** through the *Fair Competition Plan.*
- **Cooperation with relevant inspectorates** to strengthen controls and tackle abuse more effectively.
- **Making anonymous hotlines better known at the SIOD and the FPS Economy (consumer connect)**, where employees, consumers and members can report abuses within the sector without fear of reprisals.

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With these priorities, we as an industry are building a more sustainable, safe and fairer future.

[1] These figures are from all BKV members from the Social Fund Relocation Annual Report 2023
[2] These figures are of all BKV members from members' financial statements.
[3] The figures were charted for 10 participating members of the sector federation.
[4] $TCO_2e = CO_2$equivalent. This is an addition of the heating capacity of all greenhouse gases (including CH_4, N_2O) converted into CO_2
[5] The calculation of total waste includes waste from 12 of the 15 companies
[6] The number of Ambassador training hours is the total number for all Ambassador member companies.

1.3 Brief summary

The Belgian moving industry has developed an ambitious and forward-looking sustainability plan that rests on three pillars: environment, social policy and governance. This strategy is designed with a view to achieve net zero by 2050, improving social working conditions and strengthening fair competition within the sector.

Environment - Towards Net Zero

The sector aims to achieve net zero operation by 2050. To achieve this, various measures are being taken aimed at CO_2 reduction, the use of alternative fuels and compensation measures. In the short term, the sector is focusing on using biodiesel (HVO) and switching to renewable energy sources for offices and warehouses. It is also investing in technological innovations to further reduce emissions. Emissions that are difficult to reduce can potentially be offset through sectoral CO_2 projects.

Social policy - Investing in Safety and Training

The moving industry recognises that people are at the heart of its operations. Therefore, the emphasis is on creating safe working conditions, promoting ergonomic working conditions and increasing the professional competence of employees. Every year, all employees are entitled to a minimum of two training days, for example focusing on safety and professional knowledge. Investments are also made in ergonomic equipment to reduce the physical strain on movers, thus minimising workplace accidents.

Governance - Fair competition and transparency

Transparency and fair competition are essential spearheads within the sector. To combat malafide practices such as social fraud, false self-employment and illegal subcontracting, the 'Fair Competition Plan' (Plan Eerlijke Concurrentie) has been developed. This plan aims at closer cooperation with social inspectorates to strengthen controls. In addition, an anonymous hotline is being developed where abuses within the sector can be reported without fear of reprisals.

Substantiation and Future Steps

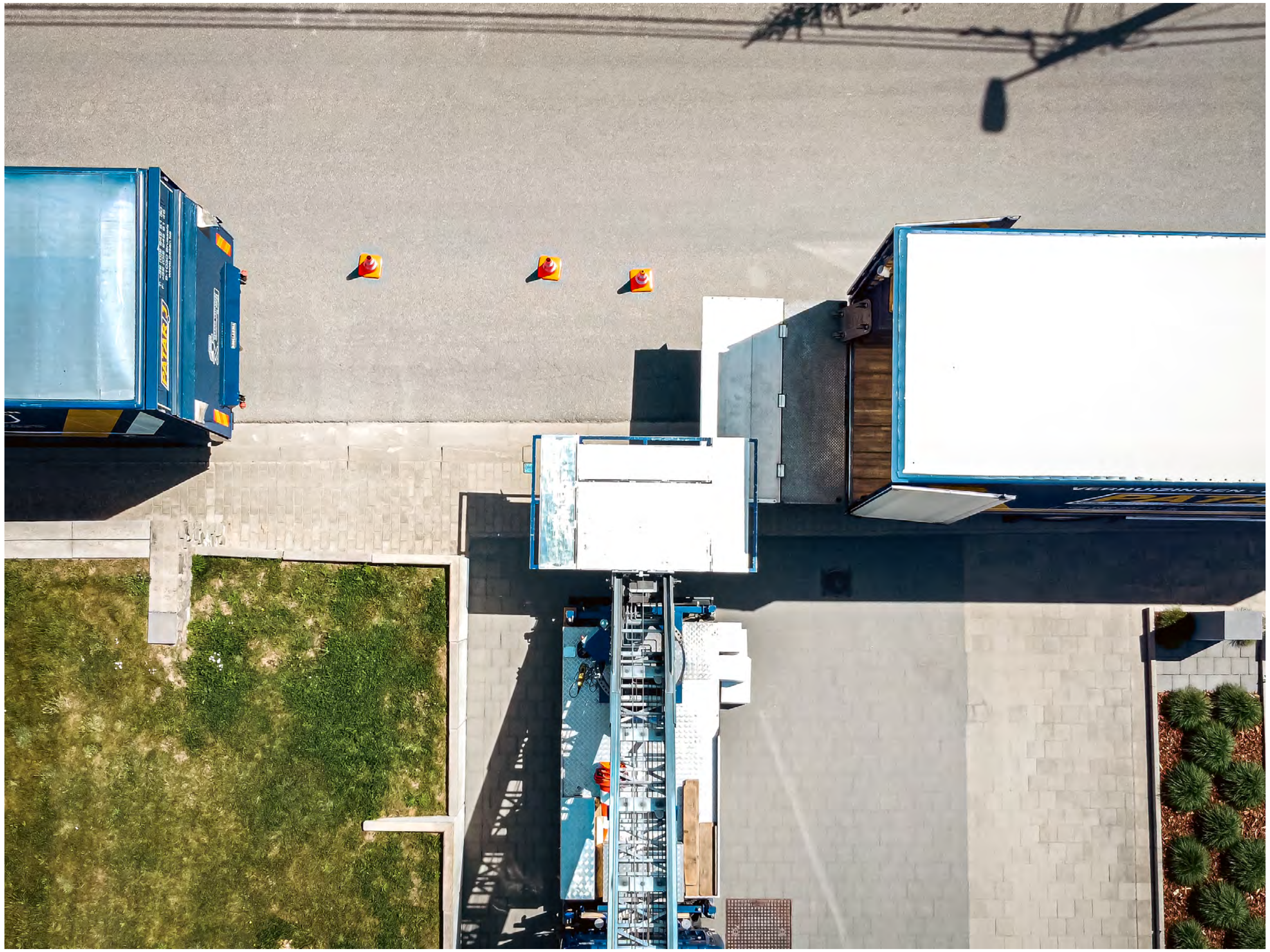
This strategy is based on sector analysis, carbon measurements and consultations with stakeholders. Although implementation requires time and investment, the sectoral approach offers benefits such as administrative simplification, economies of scale and increased transparency.

The next steps in the trajectory include the further implementation of CO_2 reduction measures, the roll-out of alternative fuels and extending the sustainability trajectory to more moving companies. In doing so, the sector is taking concrete steps towards a more sustainable, transparent and future-proof future.

2. The removals industry

2.1 Explanation of the removals industry's activities

The moving industry is an important sector in Belgium. Anyone who has ever moved has (with 99% probability) come into contact with the activities of a removals firm. Either as an individual or a company, you had them assist you with the move, or you hired your own vans[7]. But what exactly does the moving industry do? What are its main activities?



Moving: organisation and execution of the transport of household effects or business goods from one location to another, including packing, loading, transport and unloading. The organisations within BKV-CBD carry out removals for both private individuals and B2B clients, nationally and internationally.

- **Furniture storage:** temporary storage of furniture and other goods in secure storage areas, often containers in a warehouse.
- **Self-storage:** Rental of individual, secure storage units in which customers can store and manage their own belongings.
- **Lift services:** Rental and operation of moving lifts to move heavy and bulky goods, mainly for high-rise buildings or limited access.
- **Archiving:** Managing and storing physical documents and archives for businesses, with an emphasis on secure storage and easy access.
- **Third-party transport:** Offering transport services for goods from other companies, e.g. for transporting kitchens for kitchen builders.
- **Dismantling activities:** Several players within BKV are active in dismantling activities, and repair, refurbishment & resale of furniture.

[7]The full description of the industry can be found on the BKV website

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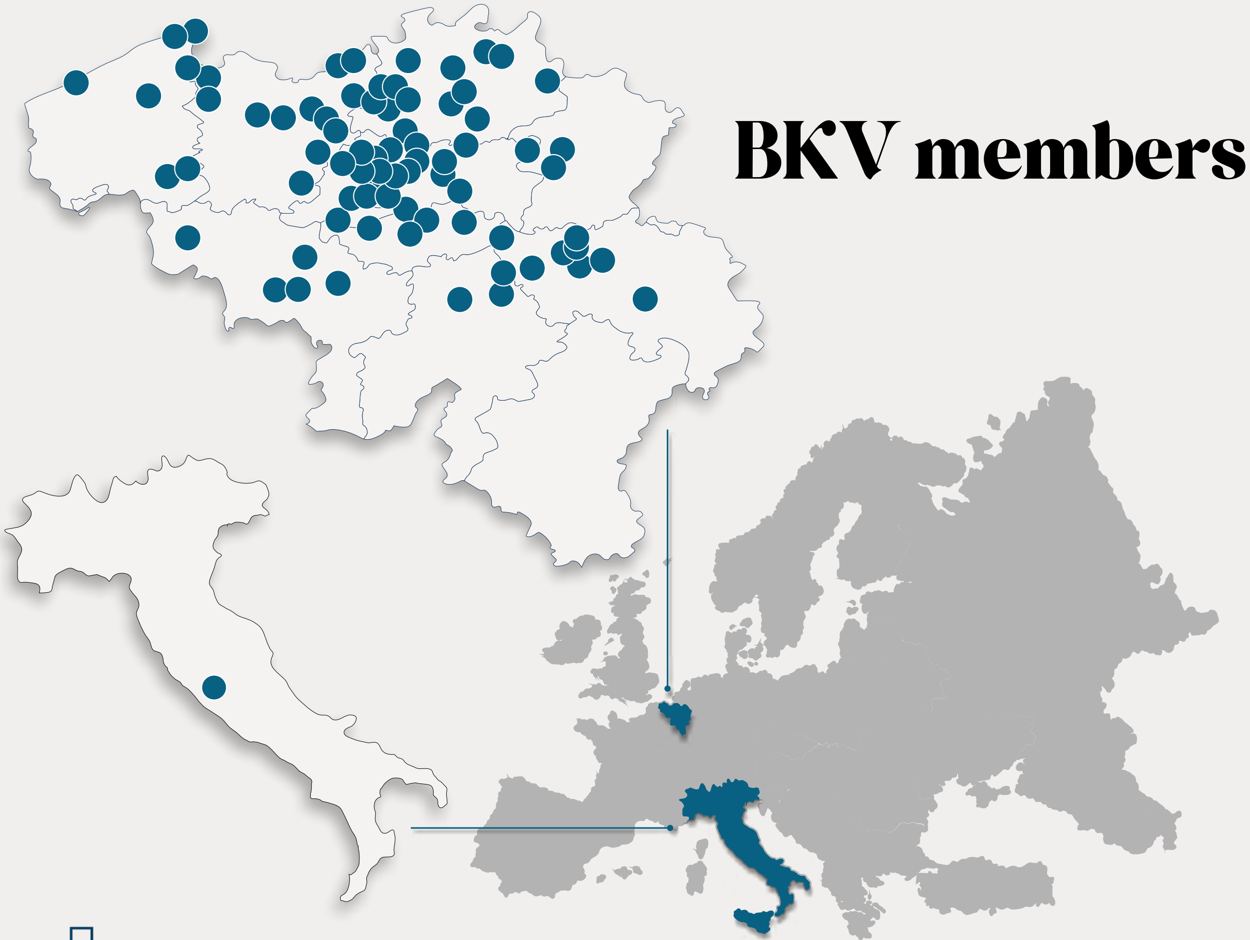
BKV handles consumer complaints and has been fighting undeclared work for a decade. It also manages the administrative side of sector government, and ensures compliance with GDPR obligations.



2.2 BKV - the sector federation

The Belgian Chamber of Removers (BKV), located at Stroobantsstraat 48A, 1140 Evere is an industry federation dedicated to the advocacy, quality promotion, and support of moving companies in Belgium since 1905. These are organisations active in the moving industry (NACE: 49,420). As an advocate, BKV represents the sector to the government and other bodies, including the Joint Committee and patron organisations such as UNIZO and UCM, and works with international partners such as Fedemac.

BKV sets quality standards for the sector, maintains general moving conditions and model agreements, and negotiates social agreements with unions. This report sets out ideas and minimum requirements to make the moving sector more sustainable. This standard stems from the analysis into material sustainability themes carried out as part of a sustainability project carried out by the sector (federation) in collaboration with The Ecological Entrepreneur.

In addition, BKV handles consumer complaints and has been fighting undeclared work for a decade. It also manages the administrative side of the sector, including accounting, budget management, contracts with the government, and IT facilities, while also ensuring compliance with GDPR obligations.

BKV together with Ambassador Removal Training and the Social Fund for Removals form the 'House of Removal'. Ambassador is the workers' sectoral competence centre within the joint committee of movers. In this way, federation can offer training and advice to members to improve their skills and knowledge. Through the Social Fund, BKV manages financial interventions, the sectoral pension plan, hospitalisation insurance, and provides answers and advice on various questions. BKV also organises networking events and meetings for members to exchange experiences and explore cooperation opportunities, with the aim of creating a professional and transparent moving sector in Belgium (BKV, 2025).

Structure & governance BKV

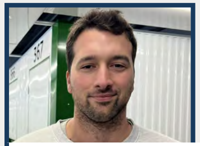
Companies under the umbrella of BKV

There are 105 companies actively affiliated to BKV through the mandate in Joint Committee 140.05. However, BKV represents all moving companies. Thus, in 2024, there were 1,218 active moving companies registered under NACE code 49.420 (removals). These companies carry out removals for private individuals, companies and public authorities. In addition, BKV also represents companies with related activities, such as:

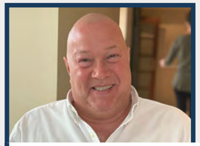
- Rental of:
    - Removal lifts and technical
    - Removal vans
    - Warehouse space for self-storage
- Rental and sale of packaging materials
- Furniture storage: storage in containers
- Archiving: archive storage and disposal
- Transport by third parties: E.g. deliveries of kitchens, furniture, ...
- Specific activities such as furniture transformation

National administration

PRESIDENT -
Bertil Durieux



VICE PRESIDENT -
Thibaut Schollaert



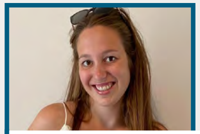
VICE PRESIDENT -
Philippe Patar

VICE PRESIDENT -
Alphonse Maniscalco

TREASURER -
Erik Meys

National secretariat

GENERAL MANAGEMENT -
Koen Vangoidsenhoven



OFFICE MANAGEMENT & ASSISTENT -
Estelle Patar

PRESS RELATIONS AND COMMUNICATION -
Lieselotte Cowie

- **National secretariat**
    - **Social fund**
    - **BKV**
    - **External**
    - **Ambassador**

Regional divisions

Flemish region	Brussels region	Walloon region
Thibaut Schollaert (Schollaert NV)	**Philippe Patar** (Patar J)	**Alphonse Maniscalco** (Déménagements Transal)
Erik Meys (Gosselin Mobility)	**Bertil Durieux** (Maison Genné)	**Jordi Descamps** (Lemort Déménagements SRL)
Sarah Dockx (Dockx Movers)	**Mathieu Vanhoucke** (Transmoove)	**Raphaël Fossoul** (Transport Fossoul)
Axelle De Roeck (All Moving Company NV)	**David Scholts** (Sandermans)	**Coralie Xhaard** (Vincent Mil)

Representatives of the regions in the National Board

Erik Meys (Gosselin Mobility)	**Bertil Durieux** (Maison Genné)	**Alphonse Maniscalco** (Déménagements Transal)
Sarah Dockx (Dockx Movers)	**Mathieu Vanhoucke** (Transmoove)	**Jordi Descamps** (Lemort Déménagements SRL)
Thibaut Schollaert (Schollaert NV)	**Philippe Patar** (Patar J)	**Raphaël Fossoul** (Transport Fossoul)

2.3 Moving industry value chain

2.3.1 The value chain

The moving industry does not exist in isolation. It is intertwined in a chain of upstream (suppliers) and downstream (customers and end-users) parties within the value chain. This is essential to map in order to map opportunities and challenges within the value chain. The composition of the value chain and key sectors are briefly outlined below:

The upstream value chain of a moving company:

- **Fuel suppliers and producers:** The moving industry relies on fossil fuel for transportation with diesel the main one used by the participating organisations. This includes the entire industry from extraction, refining to supplying the fossil fuels.
- **Manufacturers of machinery and tools:** The moving industry uses all kinds of aids such as moving lifts and truck-mounted cranes, as well as smaller aids such as blankets, safety products, tools, and GPS systems. Here, we take on the production up to the delivery of the aids.
- **Automotive:** Transportation activities are an important part of the core business of movers. This, therefore, involves producing and supplying the fleet of vehicles.
- **Energy:** This includes the production and supply of energy to the organisations within the moving industry. They will use this energy to power and heat their offices and warehouses.
- **Packaging manufacturers:** The moving industry makes extensive use of packaging to protect furniture during the move, among other things. It mainly deals with the production and supply of packaging such as plastic and cardboard.
- **Waste disposal:** Removals generate a significant amount of waste from furniture that customers no longer wish to keep and packaging materials. These stakeholders process these waste streams.

Downstream value chain of a moving company:

- **Private customers:** Private customers within the moving industry are individuals or households who seek professional help to move their household contents to a new home, both nationally and internationally. This includes house moves, student moves, senior citizen moves, flat moves, etc.
- **Corporate clients:** These include office relocations, corporate relocations, factory relocations, laboratory relocations, ... This includes moves for service companies such as banks and consulting firms, and organisations with administrative departments, such as schools and hospitals. Within this analysis, only the impact of administrative departments (and not entire organisations) is considered.
- **Makers of interiors**: Organisations that specialise in the design, supply and installation of interiors, such as kitchen builders and organisations that furnish office spaces, customers use removal services to transport furniture, equipment and other interior materials. The focus here is on efficient and careful logistics support to successfully complete their projects.

Value chain BKV

2.3.2 Stakeholder Engagement

The moving sector has a direct impact on the environment, society and economy. With sustainability becoming increasingly important, it is essential to actively involve stakeholders in making the sector more sustainable. Various stakeholders - including customers, employees, suppliers, partners and policymakers - have different expectations when it comes to sustainability.

Stakeholder engagement

The following results emerged from this stakeholder survey:

Importance of sustainability

80%

of stakeholders indicate that sustainability is important or very important to their organisation.

Expectations to BKV

60%

expect BKV to implement a sustainability policy, 24% do not and 16% are unsure.

Active steps

96%

of organisations are currently taking active steps to promote sustainability.

Importance of sustainable business practices by BKV

56%

consider it important to very important that BKV undertakes sustainable business practices.

Collaboration and initiatives:

- **48%** of participants indicated that BKV already takes sufficient initiatives on sustainability, **8%** think not and **44%** do not know.
- **44%** see opportunities for cooperation with BKV to achieve joint sustainability goals, while **8%** do not and **48%** are unsure.

The following themes emerged as important to stakeholders:

Environment:

» Energy
» Air pollution
» Water pollution
» Material consumption
» Waste management

Social:

» Employee safety
» Employee health
» Fair remuneration of employees
» Protection of human rights

Governance:

» Corruption
» Bribery

Benefits of stakeholder engagement

A targeted survey helps to:

- Mapping expectations
- Identify relevant themes, such as carbon reduction, circular economy, social responsibility and sustainable packaging materials
- Prioritise sustainability strategy

By actively involving stakeholders, the moving sector develops a sustainability strategy that is not only internally determined but also aligned with social issues and interests of all stakeholders. This dialogue helps the sector both reduce its environmental impact and contribute to an inclusive and future-proof business.

Research design

A total of 25 stakeholders were surveyed, associated with different participants and drawn from various sectors, including:

- Financial institutions
- Insurance offices
- Waste processors
- IT consultancy
- And other relevant sectors

2.4 The removals industry beyond Belgium's borders

2.4.1 FEDEMAC (Fedemac[8])

FEDEMAC's role in the European removals sector

FEDEMAC (The Federation of European Movers Associations) performs a vital function in representing and supporting moving and relocation companies in Europe. As an umbrella organisation it:

- Acts as collective voice of the sector
- Advocates with the European Union, national governments and regulatory authorities
- Helps shape relevant regulations through dialogue with policymakers
- Ensures that moving companies can operate within a fair and supported legal framework, thanks to this advocacy

FEDEMAC places strong emphasis on:

- Maintaining high industry standards
- Promoting best practices among members
- Promoting professionalism and ethical business practices

Through these efforts, the organisation helps moving companies increase their credibility and reliability. The ultimate goal is to ensure that customers can always count on consistent and high-quality services, both within Europe and beyond.

Another important aspect of FEDEMAC's work is **promoting cooperation and networking between players in the sector.** The association facilitates contacts between member associations and moving companies, creating opportunities for knowledge exchange and strategic partnerships. By bringing professionals together, it strengthens the sector and helps companies adapt to market changes and new challenges.

In addition, the association also plays an important role in providing **regulatory guidance to its members**. The moving industry is subject to complex European and national laws, and the organisation helps companies navigate these legal landscapes. By keeping its members informed of policy updates, compliance requirements and industry developments, FEDEMAC enables them to remain competitive and compliant in an evolving market.

Besides advocacy and regulation, the organisation supports **professional education and training**. At the annual Young Movers Conference, FEDEMAC offers workshops, seminars and development programmes to enhance the expertise of movers. This keeps the industry meeting the growing demands of the market.

Consumer protection is also a priority. The organisation encourages transparency and fair business practices so that customers can trust moving companies that operate according to ethical guidelines. By setting clear expectations, FEDEMAC strengthens trust between companies and customers, leading to a healthier and more sustainable moving industry.

Finally, FEDEMAC provides **crisis management support**. The organisation helps its members during economic shifts, regulatory changes and unforeseen disruptions such as Brexit or the COVID-19 pandemic. By providing guidance and support during difficult times, FEDEMAC contributes to the resilience and adaptability of moving companies.

> “
> **Through advocacy, education, networking and regulatory support, FEDEMAC plays a crucial role in strengthening the European moving industry. This keeps the industry competitive, compliant and customer-centred.**

2.4.2 FIDI[9]

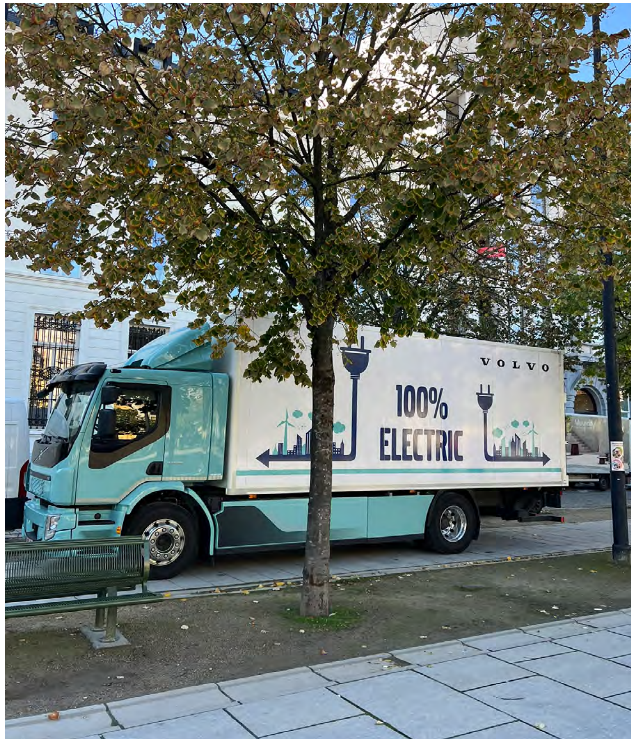
FIDI (Fédération Internationale des Déménageurs Internationaux) is a global organisation representing professional international removal and relocation companies. It plays a key role in **ensuring high quality standards**, regulatory compliance and promoting best practices. One way FIDI does this is through FAIM certification, the globally recognised quality standard in the moving industry.

An important function of FIDI is to provide training and education to its members, so that they can remain competitive and ensure excellent service. In addition, the organisation also facilitates networking and international cooperation among movers, allowing movers to exchange valuable knowledge and seize business opportunities.

FIDI champions the interests of the moving industry worldwide and works with regulators and policymakers **to ensure fair and efficient regulation** of the industry. The organisation also promotes **ethical business practices, transparency and customer protection** to ensure that customers receive reliable, high-quality moving services.

[8]https://fedemac.com/
[9]https://www.fidi.org/

3. Together towards sustainability



The moving industry is in a state of flux, and not just literally. The world is changing, customers increasingly expect companies to do their bit for a better planet, and legislation is making sustainability inevitable. But what does this mean for a sector like ours? And how can removals companies get to grips with it?

At BKV, we understand that sustainability can be a complex and overwhelming topic for many moving companies. That is why we have teamed up with The Ecological Entrepreneur and a number of moving firms to create a sustainability programme.

Our approach
We have developed a practical guide for any moving company to report on key sustainability and ESG themes

1. **Environmental**
2. **Social**
3. **Governance**

This includes more than just CO_2e emissions; such as good employment practices, working conditions, governance structures, waste management and the use of packaging materials

3.1 Sustainability within the sector in both the past and future

The moving industry has traditionally had **a strong focus on reuse**. Through their core business, removals companies give furniture and goods a second life at their new location. Packaging materials have also been reused for years, think of using blankets or moving boxes. Yet the sector faces new challenges and opportunities that call for a broader view on sustainability.

Ecological challenges and opportunities
Transport, as a core business, remains the biggest environmental challenge. The sector relies on trucks and commercial vehicles running mainly on fossil fuels, causing significant carbon emissions. At the same time, the sector is also revisiting opportunities appropriate within a circular economy: by giving (office) furniture from their customers a new life or adapting it to furniture that can be reused.

Besides environmental challenges, **social sustainability** also plays an important role. Removals companies employ a diverse group of workers, including people who find it difficult to access the labour market elsewhere. This provides opportunities to promote social inclusion. At the same time, the **physical strain and associated health risks** of work remain a concern. On governance, the sector has already taken steps to ensure quality and fair competition. Through the **Fair Competition Plan** and the quality label '**Approved Mover**', the sector demonstrates that professionalism and reliability are central. Indeed, illegal, dishonest companies often spring up within the sector, offering removal and related services without any regulation, with all the consequences that entails. They damage the sector, the safety of employees, and customer security. This is why the 'Fair Competition' plan was created and why the 'Approved Movers' label acts as a mark of quality.

At the same time, there is increasing pressure to report transparently on ESG efforts, especially through regulations such as the Corporate Sustainability Reporting Directive (CSRD). Major clients and governments are increasingly asking questions about sustainability measures, which increases the need to be proactive.

Sector-wide approach
To address these challenges and opportunities, the Belgian Chamber of Removers (BKV) (Chambre Belge des Déménageurs - CBD) has teamed up with The Ecological Entrepreneur to set up a sustainability project. The aim is to support the sector with a practical guide that not only allows moving companies to meet reporting obligations, but also to make concrete progress on themes such as CO_2 emissions, working conditions and good governance. **Sustainability is thus not an end point, but an ongoing process in which the sector works together to ensure a better future.**

3.2 One sector approach

The challenge of sustainability in the moving industry
Moving companies face a growing stream of sustainability questions: new legislation, competitive pressure, international requirements, various surveys and questions from financial institutions. This multitude of questions in various forms creates a considerable administrative burden. In addition, many moving companies are unsure where to start with sustainability or how to answer customer questions about it. This prompted The Ecological Entrepreneur, together with sector federation BKV-CBD, to develop an approach with three concrete goals.

The main advantage: from a sustainability perspective, companies are similar, which can lead to a similar sustainability focus and approach. This reduces the workload for companies and creates a standard within the sector.

How did we approach this?

PROJECT SCOPE

Data collection

» For each participating company, a data collection process was set up to identify all relevant V-SME data. This includes environmental, social, and governance indicators.

Sector Analysis

» Peer studies, international studies and interviews with all participants were used to identify the different activities, as well as the size of the sector.

CO_2-analysis

» As the sector operates in logistics, CO_2 is a focus area. All individual companies are assisted with their own CO_2 analysis, focusing on scope 1 and 2.

Reduction & compensation strategy

» A current situation analysis ('as-is') is not enough for companies and the industry. The essential question is "How are we going to reduce our CO_2 emissions?" From that angle, a reduction & offsetting strategy for the sector is being developed.

Materiality inventory

» To define the relevant sustainability themes, a materiality inventory was developed, at the sector level. As the challenges are similar at the sector level, the different 'materiality themes' could be excluded.

Stakeholder Engagement

» In addition, in parallel in the system, a survey was set up of the various participants to capture their views on sustainability. In this way, the picture of sustainability is refined, and we gain insight into the main areas of concern for the sector.

Roadmap

The Ecological Entrepreneur and sector federation BKV-CBD are working with three concrete goals:

- Develop a sectoral sustainability standard for moving companies
- A template for moving firms to easily report on sustainability in one way
- Develop a consistent way to inform customers about sustainability goals, actions and ambitions of both the sector and individual companies.

The sustainability analysis, including the dual materiality and carbon analysis, is underpinned by data from 12 participating sector members. These organisations volunteered for BKV's sustainability pathway and demonstrated a collective commitment to advancing the sector's sustainability agenda. The various participants in the pathway were[10]:

- 2ECO BV
- ABC Verhuizers
- De Roeck
- Dockx Movers
- SRL Transport Fossoul
- Mozer
- Neetens
- Patar
- Schollaert
- Transmoove
- Verhuizingen Coppens
- Verhuizingen Renders
- Putters International
- EXPMoving
- HGMN Transport & Services

3.3 The materiality analysis for the moving industry

The moving industry plays an important role in society by providing logistics solutions for both individuals and businesses. However, the industry faces several sustainability issues that are increasingly challenging. This materiality analysis identifies and analyses the key sustainability themes for the moving industry, with a focus on their impact on people, the environment and society. This analysis provides a clear basis for setting priorities and actions within the industry.

The analysis was conducted according to the guidelines of the Voluntary Sustainability Reporting Standards for non-listed SMEs (VSME). This looked at two dimensions of materiality:

- **Impact materiality:** the impact of the moving industry's activities on people, the environment and society.
- **Financial materiality:** the impact of sustainability themes on the sector's financial performance and risks.

To assess these dimensions, data were collected through interviews, sector reports and input from stakeholders. An overview of the material sustainability themes can be found in 'Appendix 2'.

At the same time, various stakeholders at the various participants were surveyed, as were their internal staff. This information helped form the material inventory to arrive at an overview of the main themes.

BKV's **material inventory methodology** was designed to reflect the different perspectives of stakeholders while being consistent with legal standards and business objectives. We began by identifying and engaging key stakeholders, including BKV members, internal teams, industry experts, customers and external partners, through surveys, interviews and workshops. Their feedback was analysed to **identify recurring themes** and concerns, which were then categorised into potential material topics. These topics were assessed based on their importance to BKV's business and their impact on environmental, social and governance (ESG) factors using a **detailed scoring system**.

Results

This process resulted in a **materiality inventory,** in which critical issues such as climate change and resource use emerged as top priorities and drive BKV's sustainability strategy. Non-material issues, such as microplastics and water consumption, were also identified, allowing the company to focus on the most impactful areas for long-term value.

Note: No follow-up step has been taken to 'IROs', or the determination of Impacts, Risks and Opportunities under the rules of the CSRD. For SMEs in line with the V-SME, this is neither applicable nor relevant at all. Based on the sector analysis, interviews, internal and external surveys, a good picture of the relevant sustainability topics can be created.

This approach developed a general basis for sustainability reporting in the industry. This provides a practical tool and framework for SMEs in the moving industry, both nationally and internationally.

> **"The industry faces several sustainability issues that are increasingly challenging. BKV has identified and analysed the key sustainability themes for the moving industry, with a focus on their impact on people, the environment and society.**

[10]See Annex 7.3

3.3.1 The materiality inventory for the moving industry

The materiality inventory analysis examined which sustainability topics have a significant impact on the organisations and are important to stakeholders in order to get a picture of the most important sustainability topics for the moving industry.

The materiality inventory

	Removal industry	Upstream value chain	Downstream value chain
GENERAL INFORMATION			
B1 - Basis for preparation reporting			
B2 - Practices for transition to a more sustainable economy			
C1 - Business model & sustainability		80%	
C2 - Practices for transition to a more sustainable economy		56%	
ENVIRONMENT			
B3 - Greenhouse gases & Energy		80%	
B4 - Pollution of air, soil and water	Air pollution	64%	
B5 - Biodiversity		32%	
B6 - Water		60%	
B7 - Resource use, circular economy & waste management		72%	
C3 - Reduction targets & climate change transition plan			
C4 - Climate risks			
SOCIAL			
B8 - General characteristics of employees			
B9 - Employee health & safety		92%	
B10 - Compensation, collective bargaining & training of employees		84%	
C5 - Additional characteristics of employees	> 50 employees		
C6 - Human rights policies & processes		84%	
C7 - Negative human rights incidents			
BUSINESS CONDUCT			
B11 - Corruption & bribery		80%	
C8 - Income from specific sectors			
C9 - Gender diversity on the board of directors		24%	

B = Basic module of the V-SME
C = Comprehensive module of the V-SME

To be examined per organisation | Material | Not material | Not applicable

The table above shows the industry result, with a breakdown between its own industry and the value chain. In this way, stakeholder views have also been included in both the report and the basis of the template.

3.4 Sustainability initiatives

3.4.1 Our commitment to the sustainability initiatives called Sustainable Development Goals (SDGs)

SDG 8: Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.

As a company and employer, it affects your day-to-day operations. With the help of the Social Fund, the sector federation is committed to ensuring fair working conditions for everyone within the sector. In addition, it does not simply strive for "growth at any cost", but for economic growth without harming the environment.

SDG 9: Build resilient infrastructure, promote inclusive and sustainable industrialisation and foster innovation

Sustainable and resilient infrastructure, such as roads, is essential for relocation activities. As we do not manage it ourselves, cooperation with governments and partners is crucial to promote sustainability and availability.

SDG 12: Ensure sustainable consumption and production patterns

BKV focuses on sustainable resource management, reduced waste and safe use of chemicals. It promotes the moving industry as a service model, focusing on reusing materials and minimising non-reusable resources.

SDG 17: Strengthen implementation resources and revitalise the global partnership for sustainable development.

The SDGs require a concerted effort across society and supply chains. BKV therefore works with members and value chain partners to achieve sustainability goals.

SDG 4: Ensure equal access to quality education and promote lifelong learning for all

Ambassador, as a sector competence centre, provides training and advice for all members to improve their skills and knowledge. Thus, the sector federation ensures the opportunity for continuous development throughout working life.[11]

3.4.2 GHG calculations according to GHG Protocol

The Greenhouse Gas (GHG) Protocol serves as the basis for calculating GHG emissions for scope 1 and 2 of BKV and participating organisations for the year 2023 and/or 2024. This widely recognised standard ensures a comprehensive and consistent approach to calculating emissions.

This methodology follows the GHG Protocol guidelines, classifying emissions into three different categories:

- **Scope 1**: direct emissions from owned or operated sources
- **Scope 2**: indirect emissions from the generation of purchased electricity
- **Scope 3**: all other indirect emissions that occur in the value chain.

First, detailed **data collection** was done over a period of time. The data were collected on energy consumption, fuel use and other relevant activities at all operational levels. We then applied **emission factors** to convert the activity data into **CO_2 equivalents** (CO_2e). CO_2e is a composite of all greenhouse gases expressed as CO_2. This allowed accurate **quantification of the carbon footprint**. This approach ensured transparent measurement of emissions and provided a solid basis for tracking progress and setting reduction targets.

[11]Source: VN (2021); FIDI (2022)

4. Environment

Sustainability and environmental awareness are playing an increasing role within the moving industry. This chapter covers all relevant themes for the sector such as environment, climate, resource use and waste. We highlight the industry's efforts to reduce its environmental footprint and contribute to a more sustainable future. From CO_2 reduction targets and the move to cleaner transport solutions to circular waste disposal and sustainable packaging materials, the sector is taking steps to minimise its impact on the environment. This chapter provides insight into the environmental strategies of BKV and its members, with concrete actions and measurable targets for the coming years.

4.1 Our environmental and climate goals

The European Green Deal requires changes within the moving sector regarding CO_2e emissions and waste disposal. BKV, together with its members, has therefore set up clear CO_2e reduction targets for scope 1 and 2 for both the short and long term.

Net zero emissions target by 2050

max 5 years

Short term:

- The sector federation mainly supports CO_2 offsets because of the difficult to reduce emissions from transport.
- Reduction of stationary combustion and electricity emissions.
  - **Conversion from gas or oil** heating to heat pumps
  - **Change to electric fleet** for staff cars and vans

Long term:

Reduction of mobile incineration through more efficient technology.
Targets related to waste

- **Encourage waste prevention and recycling:** Prevent furniture and packaging materials from becoming waste. This by encouraging reuse, donations and refurbishing. Thrift shops, buyers and charities play an important role here.
- **Deploy more sustainable packaging materials:** For example, reducing plastic and cardboard waste by using reusable bins and thinner films.
- **Support customer awareness:** Encourage customers to be more waste-conscious by making sustainable choices and leaving fewer unnecessary items behind. This helps the moving industry reduce 'integrated waste' from customers.

10-15 years

4.2 Climate change: CO_2 analysis & reduction

4.2.1 The results of our CO_2 analysis

- Total scope 1 and 2: 2.497,59 tCO_2e
- Total scope 1: 2.431,27 tCO_2e
- Total scope 2: 66,32 tCO_2e
- Carbon intensity
  - 0,62 tCO_2e per EUR 10 000 turnover.

Scope 1 & 2

Together, the 15 participants emit 2,497.59 tCO_2e in scope 1 and 2. The largest emissions within scope 1 and 2 can be found within mobile combustion, namely 85.70% of total emissions. These emissions come from the transport activities of the moving industry.

Stationary combustion accounts for 6.97% of total emissions. This is linked to 70,826.51 m^3 of natural gas (705.12 MWH) and 15,791 litres of fuel oil (160.32 MWH). These are mainly related to building heating.

Interestingly, many organisations are already committed to green electricity (purchasing green electricity and generating their own renewable energy). This amounts to an electricity consumption of 142.19 MWH of green electricity. An additional 389.76 MWH of electricity is purchased based on the country averages. In the sector, there are a number of interesting initiatives around energy consumption. For example, Dockx has set up the first energy-sharing network, where the business park shares electricity with surrounding businesses.

Scope 3 emissions: waste

Scope 3 is only included to a limited extent within the CO_2 analysis. Within the moving industry, there is a lot of waste from, for example, old discarded furniture or cardboard due to the use of moving boxes. Within scope 3, the waste category is therefore still calculated within this sustainability trajectory. When calculating the total waste in the track, 12 of the 15 companies were included. Together, the 12 participants emitted 125.99 tCO_2e in 2023 related to waste

The remaining scope 3 activities are of great importance within the sector, according to FIDI reports. Whole scope 3 is certainly the largest scope among moving companies in terms of size. This shows that collaborations with the customers and suppliers are very important.

4.2.2 Carbon intensity as an impact meter

BKV uses carbon intensity measurements to accurately evaluate its environmental impact. Carbon intensity is an important measure that helps us quantify the environmental impact of our business activities. Specifically, it measures the amount of carbon dioxide or its equivalent in other greenhouse gases (CO_2e) emitted per unit.

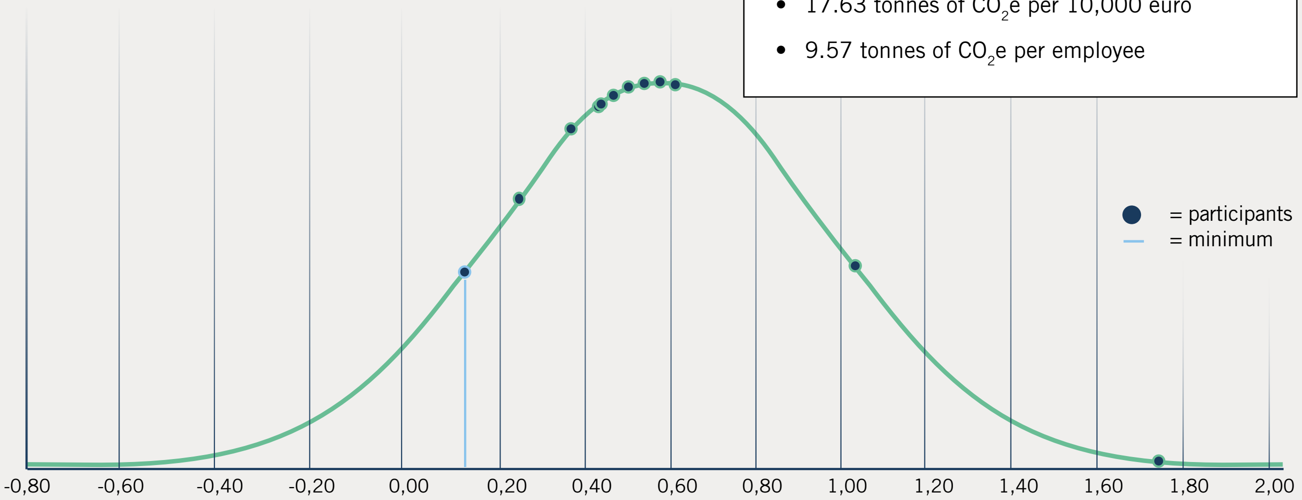
Results of our CO_2-analysis

With the help of participating members, we were able to create a normal curve for carbon intensity in the moving industry:

- 0.62 tonnes of CO_2e per EUR 10,000 turnover
- 17.63 tonnes of CO_2e per 10,000 euro
- 9.57 tonnes of CO_2e per employee

	BKV-CBD	
	Total (tCO_2e)	Share (%)
Scope 1	**2.431,27**	**92,67%**
Stationary combustion	182,78	6,97%
Mobile combustion	2.248,49	85,70%
Fugitive emissions	0,00	0,00%
Scope 2	**66,32**	**2,53%**
Purchased electricity	66,32	2,53%
Scope 3	**125,99**	**4,80%**
Waste	125,99	4,80%
Total	**2.623,58**	**100%**

Gaussian function - turnover (tCO_2e / EUR 10k)



4.2.3 Reduction strategy

BKV, together with its members, has drawn up clear CO_2 reduction targets in line with the sustainability objectives of the European Green Deal. These targets focus on both scope 1 and scope 2 emissions and have the primary goal of significantly reducing emissions to contribute to a more sustainable future.

The sector plan

Each company is responsible for setting its own reduction targets to achieve the goal of Net Zero by 2050. The sector federation puts extra focus on the specific activities of transport, waste and packaging use and it will support companies where necessary to reduce emissions here.

Net zero emissions target by 2050:

- **Short term**: the sector federation mainly supports CO_2 offsets because of the difficult to reduce emissions from transport. Stationary combustion and electricity can already be addressed by a company itself. Possibly, HVO can be purchased using group purchasing.
  - **HVO**: purchase of HVO (Hydrotreated Vegetable Oil) for the sector to significantly reduce CO_2 emissions
  - Conversion from gas or oil heating to heat pumps
  - Switching to own generation through solar panels, or energy shares
  - Conversion to electric passenger cars and vans
- **Long-term**: reduction of mobile combustion. The focus is on reducing emissions from transport by developing more efficient technology.

The specific actions BKV will take:

- **Transport emissions:** A pilot project will be set up with some members to test alternative fuels to diesel such as HVO. If this proves successful, opportunities for group purchasing will be explored.
- **Electricity emissions:** The sector federation will put more effort into collective purchasing of renewable energy as per the example of the Dockx company that set up its own energy sharing network.
- **Reduce waste:** Enable collective purchasing of reusable boxes to reduce waste.
- **Compensation regarding ETS-2:** the sector wants to set up a project to offer ETS-2 compensation to members, and equalise it at the sector level.

Emissions are re-measured annually, allowing for quick adjustments and the addition of additional actions.

Reduction at farm level

There are two strategies to obtain reductions in greenhouse gas emissions, which are also combined.

1. **Policy as reduction strategy:** Here, as an organisation, you commit to a policy in which measures and procedures are developed for employees. These could include guidelines on heating and electricity use, awareness of driving behaviour, workshop, etc.
2. **Investment as a reduction strategy:** Through this strategy, you as an organisation invest in the (short) term in new technologies and fuels to further reduce your emissions and also avoid further emissions in the future.

Investment as a reduction strategy
Investment opportunities for each category are briefly presented below. The different reduction strategies are all fully detailed in the organisation's presentation, sector and personal analysis.

> “
> ## Environmental goals can include big initiatives like eco-drive training, as well as small ones like turning off the music when there is a break.

CATEGORY	INVESTMENT
Stationary combustion	• **Sustainable heating technologies:** switch to a heat pump (if using green energy • **Renewable fuels:** fuel oil replaced by HVO100, gas replaced by green gas
Mobile combustion	• **Electrification fleet** (passenger car • **Diesel replaced** by HVO100 (moving vans) → DEMECO already uses HVO (see sustainability report) • **Optimisation of vehicle use:** analysing each trip and determining whether it is necessary or can be combined with other trips, as well as optimising route plans using technology.
Purchased electricity	• **Green power:** replace current energy contract with a green power • Increase energy efficiency of buildings by an **energy audit** • Increasing own electricity generation through **renewable sources**

Sector example: At Transmoove, every employee has their own achievable environmental goal. This is important to get everyone thinking and creating ownership around sustainability. This can include larger initiatives such as eco-drive training courses focused on fuel-efficient driving, but also small initiatives. For example, a warehouse worker can turn off his music when he has a break.

Climate change creates a number of physical risks in the sector, and regulations and market changes mean that the transition period with regard to reducing CO_2e emissions comes with several challenges.

4.2.4 Monitoring & reporting

Carbon intensity plays a crucial role in tracking our progress and ensuring we meet our 2050 reduction targets. The goal is to decouple carbon emissions from economic growth by increasing carbon efficiency in operations, resulting in lower carbon intensity rates in the coming years. By focusing on carbon intensity, BKV can monitor members' activities and emissions over time and thus make meaningful progress in achieving sustainability goals.

In addition, the intention is **to report annually on the CO_2 analysis** of the participating companies, and by extension the other companies. This will give us a picture of the evolution of each organisation. To make it easier to calculate CO_2 emissions in the sector in the future, FIDI offers the World Favor CO_2e-calculation tool with industry-specific emission factors.

This report will also be prepared by BKV year on year, with a small update to inform the sector. Additional participants are always invited, and are welcome to strengthen the sector initiative. By recalculating the CO_2 analysis annually, the sector's emissions can be continuously mapped.

4.2.4.1 Carbon Alt+Delete: Carbon accounting software

The CO_2e calculations for the participating organisations were carried out using the Carbon-Alt-Delete software that operates according to the GHG Protocol, a globally recognised standard for measuring greenhouse gas emissions.

This software offers several advantages:

- calculating your CO_2e footprint by assessing emissions in scope 1, 2 and 3 categories
- real-time tracking
- accurate monitoring of emissions
- track emissions over time
- identify high-impact categories
- measure the impact of their reduction strategies

4.2.5 Compensation & tax

BKV is aiming for Net Zero by 2050 with the entire moving sector. This implies that the sector wants to move to zero emissions and therefore significant reductions are needed to achieve this. However, there are emission categories that are difficult to reduce. Offsets can be used for these. BKV wants to enable the offsetting of CO_2 emissions using sectoral projects to offset scope 1 and 2.

Regarding the cost of offsetting, a company pays the **carbon cost**. Carbon cost in the relocation sector refers to the potential financial amount a company would have to pay for its carbon emissions. These costs are usually expressed in euros per tonne of CO_2 equivalent emitted (tCO_2e) and these range between market costs (around €30 per tCO_2e) and so-called 'tax costs' (which can reach €65 (or higher) per tCO_2e in the European Union's emissions trading system). These amounts are used as an example to identify the real cost of CO_2e. Taxes are charged directly for emissions to companies, which can result in large annual payments. Market costs, on the other hand, come from voluntary carbon offset purchases.

New Emissions Trading Scheme impacts relocation sector

In the European Union, we see different forms of carbon taxation appearing. So far, the European Emissions Trading System exists only for energy-intensive industrial sectors, aviation within the EEA and maritime transport (ETS-1). However, ETS-2 will also start in 2027. This is an extension of the ETS to road transport, among others. A carbon cost of €45 per tCO_2e is expected to be charged through fossil fuel suppliers in the transport sector, exerting an impact within the relocation sector (European Commission, 2023).

Investing in emission reduction strategies, such as improving energy efficiency or using greener technologies, offers a cost-effective alternative to paying rising carbon taxes. Such proactive measures are not only in line with environmental goals targets, but also provide long-term financial savings.

4.2.6 Climate risks

Climate change creates a number of physical risks in the sector, and regulations and market changes mean that the transition period with regard to reducing CO_2e emissions comes with several challenges.

Transition risks

Companies that still emit relatively high levels of CO_2e emissions will face **competitive disadvantages**. Increased awareness among investors and customers will cause them to increasingly choose removals companies with a lower climate impact. Companies that do not reduce their emissions will face competitive disadvantages and possibly even **reputational and income damage.**

In addition, the moving sector will face higher costs and restrictions on operations in cities due to strengthened environmental legislation such as requirements within low-emission zones (LEZ). These LEZ laws already require greater investment with regard to the vehicle fleet and this will increase over the next five years. In addition, the sector faces rising prices for CO_2e emissions because of offsets or taxes (see explanation in section 4.2.5) in the longer term within five years.

Technological development, such as low-carbon fuel in the transport sector, may offer a solution. At the same time, this creates competition vis-à-vis established fossil fuel-dependent companies. For example, land transport will be preferred over air transport where possible, because of the reduction potential (UN, 2024).

Because of fast-moving sustainability requirements within the value chain, regulations and changes, it is essential that a company sets up an appropriate **reduction plan** with specific reduction targets. It is expected that within five years, sustainability will have a greater impact in the sector which also brings climate-related risks in the short term.

Physical risks

Climate change in itself also brings a number of physical risks to a business. **Infrastructure and mechanical equipment** is not always prepared for the rising temperatures and more frequent heat waves, so technical problems are possible. **Physical labour** is also heavier in heat. Potentially, this affects workable hours, such as break, start and start times and employee well-being (UN, 2024).

4.3 Transport

Transport is the biggest cause of **environmental impact** within moving operations. This is because it impacts the amount of **greenhouse gas emissions and air pollution**. In addition, transport activities also indirectly contribute to other environmental challenges. This is mainly due to the use of diesel as the main fuel. Regulations respond to this by establishing low-emission zones in cities, mainly because of air pollution. Specific provisions are drawn up by the cities themselves (Flemish Government, 2024).

4.3.1 Fuel consumption & CO_2e emissions

This table shows the share of energy consumption based on the type of fossil fuel used. The main fuels within the moving sector are:

- diesel and petrol for transport
- gas and fuel oil for heating and fuel oil for machinery.

With regard to reducing transport fuels, low-carbon alternatives such as **Hydrotreated Vegetable Oil** (HVO) can be looked at. This can be refuelled in any standard diesel tank, facilitating implementation.

Currently, however, HVO can only be refuelled in a limited number of places in Belgium. While the Belgian government has explored some initiatives to make renewable fuels such as HVO more fiscally attractive, no specific reduction in excise duty on HVO has currently been implemented. Switching from diesel to HVO can lead to a CO_2e reduction of 70-90% depending on its origin.

Fuel consumption & CO_2e-emissions

	Energy – Fossil fuels		
	Volume (L/m³)*	Total (MWh)	% Share
Type of fuel		10.321,88	
Diesel	**901.346,99**	**9.043,52**	**87,62%**
Petrol	38.662,99	370,60	3,59%
Fuel oil	19.891,73	201,96	1,96%
Natural gas	70.826,51	705,12	6,83%
Smeermiddel	60,00	0,67	0,01%

Table 1: Fossil fuel consumption within the moving industry (The calculation is based on participating organisations).Note: Diesel, petrol, fuel oil and lubricant are expressed in litres (L) and gas in m³.

“

The moving industry is increasingly committed to more sustainable transport. Many removal companies are making the switch to EURO 6 trucks, which are more fuel-efficient and less polluting than their EURO 5 predecessors.

4.3.2 Air pollution

Road transport has a **negative impact on air quality** through emissions of sulphur oxide (SO_x), nitrogen oxide (NO_x) and particulate matter (PM). For example, road transport was responsible for 47% of NO_x emissions the Brussels Capital Region in 2022 (Bruxelles Environnement, 2022). The full list of participating companies can be found in the Appendix.

Poor air quality affects **health** and can cause respiratory problems, cardiovascular disease, diabetes and even cancer (European Parliament, 2023).

The high dependence on diesel fuel is of particular concern. Although diesel engines are more economical than petrol engines with regard to CO_2e emissions, they produce more harmful air pollutants (Flemish Government, 2023) With regard to participating companies, 95% of composite air pollution comes from diesel combustion.

Technological improvements in vehicles already reduced fine particulates (PM2.5) by 92% between 2005 and 2022 (Flemish Government, 2023). The preference for less-polluting transport is thus essential for an improvement in air quality. This is also the reason why low-emission zones have been established in, for example, Antwerp, Ghent and Brussels to keep out diesel cars and trucks with a lower Euro standard (until the end of 2025, Euro 5 is allowed, from the beginning of 2026 only Euro 6) (VMM, 2024). In addition, the Belgian government also wants to push for **zero-emission zones for urban logistics** (ZES), banning polluting trucks and vans for good. This means electric vehicles should be used in cities. However, the final plan is still under development (Flemish Government, 2025).

4.3.3 Transition towards more sustainable transport

The moving industry is increasingly committed to more **sustainable transport**. Many removal companies are making the switch to EURO 6 trucks, which are more fuel-efficient and less polluting than their EURO 5 predecessors. In addition, a smaller but growing number of companies have already invested in electric vehicles. Although electric vehicles are not currently suitable for all transport types, alternatives such as biofuels, including hydrogen-treated vegetable oil (HVO), are increasingly being considered.

To implement this sustainability effectively, a clear policy on the use of specific vehicles per type of transport is needed. Smarter logistics solutions, such as efficient transport planning, compact packaging and combined transports, can also help to further reduce the number of kilometres driven and associated emissions.

Scope 3 Waste

	Waste	
	Total (tonnes)	% Share
	6.506,86	
Residual household waste	**3.870,36**	**59,48%**
Paper and cardboard	**1.400,25**	**21,52%**
Plastics	17,14	0,26%
Furniture and construction waste	**798,12**	**12,27%**
Metal	275,47	4,23%
Wood waste	145,46	2,24%
Green waste	0,04	0,00%
Hazardous products	0,02	0,00%

Note: Results from CO_2 analyses of the 12 participating members of BKV. Waste was left out of scope for Putters, EXPMoving and HGMN Transport & Services.

4.4 Waste

The waste theme is of great importance in the moving sector because of the significant amounts of waste and packaging materials resulting from moving activities. In addition to scope 1 and 2, emissions for the sector were also determined for the 'waste' category within scope 3. This category can be split into two parts.

- On the one hand, there is the material purchased among other things to protect the furniture to be moved, such as residual waste, paper and cardboard.
- On the other hand, when moving house contents or (office) furniture, there often remains a quantity of waste such as old desks, tables and chairs that customers do not wish to take with them to their new location. The good pieces regularly still find a second home, but processors have limited capacities and storage space, so the less desirable or lower-quality surpluses end up in the trash.

Although organisations in the sector are already making many efforts to reduce this waste, waste management remains a key priority .

4.4.1 The Industry's Waste Mix

The figures show that waste is an important category for the sector. A large proportion of waste is '**integrated waste**', i.e. waste from customers' premises. In many removals, firms, companies and individuals tend not to want to take certain waste with them. They expect the moving firms to clean it up. This is why there is a huge amount of waste in the plastic, furniture, metal and wood sector.

Paper & cardboard obviously remains a concern as many companies have their own boxes. These boxes last up to four to five times, continuously generating new waste.

4.4.2 Circularity

The industry is already doing a lot to give customers' furniture a second life, but it also encounters challenges here. The first step is to see if it is possible to avoid disposing of furniture. For example, larger customers such as banks store furniture for possible reuse later. The sector also uses **thrift shops, buyers and auctions** to give unwanted furniture a second home. However, the supply to thrift shops, for example, is very large and still growing, so they are taking in less and less. Alternatively, furniture can be donated to charities or schools.

Another option is to **repair or refurbish old furniture**. For example, 2Eco and Transmoove focus on converting old or no-longer-usable furniture into new furniture. As a final option, old materials can be sorted out and recycled in consultation with waste processors. However, the aim is to avoid waste and only if not otherwise possible to process the waste as best as possible.

Case study Transmoove

Transmoove reuses 60-80% of its office furniture. With the help of a sheltered workshop, they guarantee that it meets the same quality and design requirements as new furniture. For the office furniture that companies no longer need, they created side routes. That furniture is given a new life through NGOs, non-profit organisations and local youth movements.

4.4.3 Customer awareness

The challenge with the moving industry remains the focus on **packaging, and waste**. For packaging materials, there can be an increasing focus on sustainable packaging materials, through both reuse of the standard cardboard box, to the effectively reusable box, reusable bins.

At the same time, **customer waste** is a big problem. There is little thought by consumers, and sometimes businesses, about what they leave behind, or expect to be cleaned up. Currently, a plan to create more awareness is absent, as it requires a general conversion of the market. When quotes are prepared, customers are reminded that a removal firm has no responsibility for waste, nor the appropriate legal frameworks.

4.4.4 Sustainable packaging materials

The removal sector is increasingly striving for sustainable packaging materials. A good example is the switch to a thinner 6 den foil instead of the standard 18 den foil, allowing plastic use to be avoided Transmoove In Belgium, however, cardboard moving boxes are still widely used, only some of which are reused by removal companies. However, there are suitable moving boxes to be reused four to five times (Notabrownbox, 2023).

Yet there are even more **sustainable alternatives**. The Netherlands already uses reusable boxes more frequently for moving, and similar initiatives exist in Belgium too, albeit mainly focused on private removals. For corporate removals, this is even more limited, and cardboard boxes are used for many tenders because of price.

A good example is Roldo Rent, a company that rents moving equipment with a focus on 100% recyclable products. Their plastic moving boxes have a lifespan of as much as 20 years, considerably longer than the traditional cardboard box. BKV members also benefit from a 10% discount when renting these materials.

5. Social

5.1 Our social goals

At BKV, we are committed to creating a safe and positive working environment for all employees of our member organisations. In the demanding conditions of the moving industry, ensuring the safety and well-being of our employees is paramount. We believe that a supportive and inclusive workplace not only drives innovation and productivity, but also protects our teams. By prioritising safety, equality and respect, we enable our staff to thrive, reflecting our commitment to decent work and sustainable economic growth.

5.2 Movers in figures: a diverse workforce

The moving industry is one that relies heavily on the commitment and expertise of its employees. Its workforce numbers 3,375 employees, who will have collectively performed more than 2 million hours by 2023. This workforce is diverse, not only in terms of roles and responsibilities, but also in forms of work and contracts. In this chapter, we discuss:

- the composition of the workforce
- the specific challenges for blue and white collar workers
- the use of temporary workers
- the role of P- and S-cards within the sector (P-cards designate permanent employees, S-cards temporary employees. This was developed to combat undeclared work

Social data overview[12]	BKV
Number of employees on 31.12.2023	3.375
Total hours worked	2.023.634
Full-time	2498
Part-time	976
Men	3055
Women	320
White-collar workers (495)	509
Blue-collar workers (015)	2590
Trainees (027)	2
Students (840)	263
Entered	3.441
Exited	3.345
Number of S-cards	1321
Number of P-cards	2336

Employees within BKV

The high number of 'exits', indicates a high turnover of employees. A limited survey (2 respondents out of 10) and at a round table discussion with 8 (out of 10) participants revealed that many companies work with temporary workers to supplement peaks and troughs in the industry.

5.2.1 Workers & employees: different roles, shared responsibility

The moving industry is characterised by a clear division between blue-collar and white-collar workers, each of whom plays a crucial role in the success of moving companies.

Workers: the movers

With 2,590 workers, this group forms the largest part of the workforce. These mainly male workers, are responsible for physical activities at customers' premises. Movers carry heavy loads, often work in challenging conditions such as narrow staircases or heights, and have to combine their work with strict deadlines. This poses significant safety risks and requires constant attention to ergonomics, safety and health.

Clerks: our administrative staff.

Besides the workers, there are 509 white-collar employees, who mainly focus on administrative, management and strategic tasks. They ensure proper planning, efficient organisation and support for the movers. The gender distribution in this group is more balanced than among the blue-collar workers.
Due to the complementary roles of blue and white collar workers, it is important for companies to pay attention to the specific needs of both groups and focus on fair opportunities and support.

5.2.2 Temporary workers

To cope with peaks in demand, the sector regularly uses temporary workers, such as fixed-term contracts, flexi-jobbers or students. In 2023, 263 students were active within the sector. While these flexible contracts are necessary to manage the seasonal nature of the sector, they can pose risks.

A long-term reliance on temporary contracts can lead to uncertainty for workers and a lack of continuity within companies. It is important to strike a balance between flexibility and job security so that temporary workers can be integrated without compromising workforce stability.

5.2.3 P& S cards in the moving industry

The relocation industry uses two main administrative tools to manage social regulations: P-cards and S-cards.

P-cards

- Developed specifically for the removals sector
- Keep accurate records of employee performance
- Ensuring compliance with working conditions

S-cards

- Used for registration of temporary workers
- Guarantee that temporary workers work within legal frameworks

> **These tools provide valuable support in managing a diverse workforce and help moving companies both comply with legal obligations and promote transparency.**

[12]*There is a difference in total number of employees under gender and type of employment contract. This data comes from the analysis of the Social Fund Movers and they see possible causes in the fact that employees may have worked for 2 different employers or under a different type of employment contract (making this occur 2x).

5.3 The safety of our employees is a priority

Safety and health are very important issues for the removals industry, given that the work is stressful and heavy for workers. In Belgium, an occupation is characterised as heavy based on four criteria: physical severity of work, irregular hours, safety risks and stress. The moving industry meets all these criteria, highlighting the importance of this issue.

Movers who do the job for a long time suffer from neck and back pain. Although efforts are already being made to train employees around ergonomics and even some organisations (Schollaert & Dockx) are betting on the use of exoskeletons, there is still great room for improvement here towards the future. Dockx also reimburses the costs of osteopaths and physiotherapists for its employees. In this way, they try to support employees preventively so that they do not create permanent back or other complaints.

Besides health, safety is also very important. Organisations regularly experience minor work accidents (injuries to hands and feet, e.g. a broken finger or knocked-over foot). Larger work accidents mostly take place during commuting. Although preventive measures are already being taken on this topic too (clothing, screening the workplace for hazards, etc.) and efforts are being made to raise employee awareness, this remains a point of attention for all organisations, as they will all have recorded at least one workplace accident by 2023. This shows that continued attention and action in this area are essential.

5.4 Working conditions

5.4.1 Movers as a bottleneck profession

From all the questionnaires, stakeholder conversations and round tables, it is clear: movers are a bottleneck profession. All participants indicate that finding the right quality staff is the biggest difficulty for growth within the sector. FIDI also cited this in its annual sector reports in which articles appeared on 'the war on talent.
Participants indicated that staff who have been with them for a long time often stay for a long time, but finding motivated staff who speak Dutch/French is seen as a major challenge within the sector.

Individually, the sector and participants have tried many different initiatives, but few are considered successful. Examples of initiatives include: projects through Ambassador, collaborations with VDAB, job days, etc

Heavy work and more difficult work-life balance are considered the biggest causes of this challenge. The work performed by workers is physically demanding and taxing on the body. As a result, workers who are employed by removal companies for longer periods of time regularly suffer from neck and back pain. Besides, many more organisations work 6 days out of 7 (Monday to Saturday) and flexibility is expected from employees. The movers know when the day begins, but usually not when it ends (depending on the move).

Also, increasingly strict regulations and tightened exams for drivers with a C driving licence mean that fewer and fewer employees or starters are willing or able to obtain this licence. In addition, in most organisations there are only limited career opportunities for workers.

5.4.1.1 Sector example Mozer

In addition to its moving department, Mozer also has a department more specialised in more technical activities such as installing and moving ATMs, moving and installing medical equipment, etc. For this reason, the organisation can offer its employees a broader growth framework. Employees who wish to do so can follow a training programme within the organisation to become a 'technician' and thus join this team in the longer term. Mozer cites this opportunity as one of the reasons staff stay longer/join the organisation.

5.4.2 Compensation

Remuneration is and remains an important part of the moving industry. Most starters earn a minimum wage, agreed within the joint committee of movers: PC 140.05. In addition, several players also offer fringe benefits such as 'meal vouchers'. Historically, this mainly involved working in regimes of 6 days which is also being scaled back to 5 days.

The minimum wage will be used by all participants in hot track for new starters. The sector federation BKV will also help negotiate these wages in the joint committee. Since wages are one of the reasons, combined with the work regime, that workers are hard to find, the Social Fund for Relocations plays an important role. They offer several fringe benefits, and protections to employees.

5.4.3 Social Fund Removals

The Social Fund for Removals of the Belgian Chamber of Removers (BKV) is an industry fund that manages social benefits and financial interventions for employees within the removal sector. This fund plays a crucial role in ensuring social protection and supporting employees in various areas.

5.4.3.1 Key Tasks of the Social Fund for Relocations

- **Management of the Supplementary Pension**

Since January 2022, the Social Fund has been building up a supplementary pension for employees in the removals, furniture storage and related activities sector. This pension is financed entirely through employer contributions, with no financial contribution from the employees themselves. The supplementary pension provides pension benefits (a non-statutory pension with guaranteed returns and possible profit sharing) and solidarity benefits (additional support in case of illness, accidents or unemployment).

- **Care for Social Security**

The fund also manages hospitalisation insurance and provides financial interventions for employees within the sector. This helps cushion risks and promotes employee welfare.

- **Training and Education**

Through the Ambassador competence centre, training courses are offered aimed at the professional development of employees. These include lift training courses, VCA safety and communication skills.

- **Support for Employer and Employee questions**

The Social Fund offers advice and information to employers and employees on various social issues. This includes help with administrative matters and compliance with social obligations.

- **Social Balances and Monitoring**

The fund keeps statistics on the sector, such as the number of working hours, enlistments and exits, and the composition of the workforce. This data is used to analyse social trends within the sector and improve services.

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By setting global standards, providing professional support and promoting international cooperation, FIDI strengthens the industry and contributes to smoother and safer international moves for businesses and individuals.

5.4.3.2 Why is the Social Fund Important?

The social fund performs three important roles. It helps organise social security, leading to additional social protection on top of legal requirements. It supports in the professional development of employees, ensuring fair working conditions and sustainable employment.

More information can also be found in the Social Fund's annual report.[13]

5.4.4 Actions

To attract more staff, and protect the current workforce, the industry wants to get behind four goals.

1. Minimum workplace accidents through prevention and awareness.
Employees know that they should never sit on a lift, for example, or work without gloves. Constant repetition & alertness remains very important to keep co-workers aware.

2. Training employees to better prepare them for physical and ergonomic risks.
Specific focus on ergonomic risks in relocation

3. At least two training days per year per employee to enhance safety and professional competence.
Currently, co-workers do not achieve 2 training days per year. The aim is to work on this further to instil the right skills, especially focusing on safety, fire safety and ergonomics.

4. Invest in ergonomic materials and equipment to reduce the physical strain on movers.
Several players already have exoskeletons on offer that can help employees with heavy work. This ensures their backs are better protected, and can contribute to overall ergonomics.

[13] Annual social fund relocation report

5.5 Personal development & training

In the moving industry, continuous employee development is essential to ensure both quality and safety in the workplace. Currently, the average number of training hours per employee is 0.88 hours per employee per year. In 2023, Ambassador's number of training hours decreased by 5.46%. The reason for this is related to the expiry of C/CE driving licence renewal training.

By 2026, a mandatory training standard will be introduced whereby every employee is entitled to a minimum of two training days per year. To make this objective achievable and accessible, we are investigating how low-threshold training methods, such as online videos and e-learning modules, can contribute to flexible and efficient knowledge building within the sector. This will not only invest in the competences of employees, but also in the future-proofing of the moving industry.[14]

5.5.1 Ambassador[15]

Ambassador is the expert in training for the moving sector and therefore an important part of the 'House of the Move'. Ambassador's objective is to ensure a qualified inflow within the sector and the organisation of continuous training, taking into account the evolution and state of the Belgian labour market. This includes for all employees in the moving, furniture storage and related activities.

Ambassador training hours

The number of training hours compared to the number of employees in the sector is relatively low. Therefore, further efforts are being made on training, and a target is being set to provide at least 2 days of training per person.

Total number of training hours Ambassadors	2716
Total number of lessons offered Ambassador	630
Total number of employees with training at ambassador	252

Activities Ambassador

- customise
- retraining
- specialise
- retraining
- recruit
- select
- employ
- evaluate

Ambassador uses knowledge from the sector by, among other things, giving the floor to experience experts, including several business owners and managers from the participating companies in the sustainability analysis[9].

Ambassador's Core business

Ambassador is committed to various initiatives to support workers and businesses in the moving industry, including:

- Cooperation with FPS Work and Flemish government for subsidised projects.
- Promotion of the profession, with a specific focus on attracting young people to the sector.
- Driving licence training, including renewal courses.
- Offering some 40 training courses, both on-site at BKV and in-company at moving organisations.

The training offer

Ambassador has years of experience in the organisation, promotion and funding of various training courses. This includes:

- Technical training (hard-skills)
  - Mover:
  - Carrier (damage prevention, workplace safety, etc.)
  - Packer (packing materials and techniques, documentation, etc.)
  - Ladder lift operator (operation and safe working with a removal lift)
  - Ergonomic principles (back school, lifting and hoisting techniques)
- Communication training (soft-skills)
  - Dealing with customers (specifically for movers and middle managers)
  - Attitude training
  - Coaching
- Safety training
  - Working safely in the removal sector
  - VCA certification
- Driving skills:
  - (Renewal) driving licences
  - Ecological driving
  - Safety & ergonomics

In addition, Ambassador offers customised training tailored to the specific needs of companies.

[14]Bron: Sociaal Fonds jaarverslag verhuizingen 2023
[15]Bron: https://ambassador-vzw.be/over-ons/

5.5.2 Actions Ambassador

Key achievements of Ambassador in 2023[9]

- **Expansion of training offer:** The training offer has been expanded to better meet the needs of the industry. Among other things, we now offer the following training courses: VCA training, language coaching, job coaching, mobile equipment training, project relocation training and C driving licence training.
- **Adapted funding modalities:** Ambassador funds all new and existing training courses, provided certain conditions are met. Training courses are available to both P- and S-card holders, with S-card holders required to demonstrate at least 75 days worked in the industry.
- **Extra focus on vulnerable young people:** Ambassador's NAR youth project focuses on young people aged between 18 and 26 who find it difficult to access the labour market. This project is a partnership between the employer, the young person and Ambassador. Through this project, Ambassador funds the obtaining of driving licences B and C, promotes the promotion of the profession and encourages collaborations with education.
- **On-the-job training:** In addition to pre-scheduled open training courses at our training locations, employers can also organise internal or in- company training courses. These training courses can be recognised by Ambassador Removal Training vzw.
- **Ambassador is constantly adapting and even providing tailor-made solutions:** Ambassador Verhuisopleidingen vzw works together with EDCO, ERS-Academy and Traffix for training courses such as driving licences B and C, mobile equipment and refresher training in professional skills, if the location or time does not fit in their own training calendar. This way, they can offer tailor-made training courses. The rates for these training courses are the same as Ambassador's standard rates.
- **The implementation of the new action plan:** 2023 was the third year of the implementation of a new action plan focusing on the changing needs of the relocation sector. The key points of this action plan are:
  - Development of new training such as distance learning, digital training, language training, webinars, support for the B driving licence and funding for training related to mobile equipment.
  - Further digitalisation of the operation of the training centre.
  - Improved communication and visibility through the website.
  - Providing on-the-job training as much as possible.
  - Support in passing the theory exam for driving licence C.

5.6 Diversity

5.6.1 Gender balance[9]

	Men	Women
Blue-collar workers	2.561	29
White-collar workers	229	280
Trainees	2	0
Students	263	11
Total	3.055	320

In the moving industry, there is a large distinction in gender diversity by type of work. The workers working in the industry are largely men. Only 29 women work as movers. With regard to office work, there is a greater gender balance. There are 280 women working as clerks in the sector and 229 men, often for clerical work.

Also with regard to the influx of new workers from schools, such as students and trainees, you can see that these are mainly men. This can be explained because moving work is typically a physically demanding profession and therefore less accessible to women. More women in the sector could lead to more empathy regarding the profession. However, we see that women who enter the sector often do the work for a shorter period of time than men.

5.6.2 Minority groups

The relocation sector does provide a home for minority groups, such as the low-skilled and young people. To attract more young people from minority groups, Ambassador has up the **The NAR Youth Project**, which targets young people aged between 18 and 26 who find it difficult to access the labour market. This project is a partnership between the employer, the young person and Ambassador. Through this project, Ambassador funds the obtaining of driving licences B and C/CE, obtaining the proofs for driving a forklift/reachtruck and promotes the promotion of the profession and encourages collaborations with education.

5.7 Employee engagement

A recent employee survey of participating organisations shows that 50% of employees consider **sustainability and social responsibility** to be important issues within their organisations. The results show that there is both a willingness and a need to actively contribute to sustainability initiatives, provided clear communication and visible benefits are created. Sustainability is mainly associated by employees with **long-term use of materials, recycling and resource efficiency.**

However, this also involves **social initiatives**. In the survey, 70% of employees say they consider it important to be heard in decisions within their organisation, highlighting the importance of participation and voice. Safety and health are also considered very important within the sector. By actively involving employees and making benefits of sustainability measures visible, the sector can make further progress towards a sustainable future.

5.8 The sector strengthens our workers

5.8.1 Social consultation

The social dialogue within the Belgian Chamber of Removers (BKV) is an essential part of the organisation and plays an important role in representing the interests of the moving industry.

It includes various elements of cooperation with social partners, the social fund moves, the Ambassador training centre. The role of social consultation is to shape **wage agreements**, **working conditions, training, striving for fair and transparent agreements** that contribute to a sustainable and socially responsible sector.

As a whole, social consultation contributes to 'better working conditions', 'more training & development', 'cooperation with trade unions and sustainability initiatives. Social consultation at BKV is thus a **structured and integral part of the sector operation**, aimed at improving social aspects and encouraging sustainable growth within the moving industry.

5.8.2 Plan Fair Competition

The removals sector is one that has long paid attention to **fair competition and the fight against social fraud**. A cooperation agreement between the removals sector, social inspectorates and the SIOD was concluded in September 2016. Today, a first Fair Competition Plan to make the fight against social fraud and social dumping more concrete follows with a whole series of measures. This plan was signed by BKV, social partners and government departments in 2024. This plan equally protects the companies themselves, and the employees as they will then have more protection with companies that apply the same rules within Belgium.

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Firm Neetens supports various charities and non-profit organisations, for example by purchasing chocolate Easter eggs through them instead of through shops or web shops.

5.9 The sector strengthens our communities

Several participants say they support, and strengthen, local communities.

5.9.1 Neetens firm

At the Neetens firm, we are actively committed to **social involvement**. We support various charities and non-profit organisations, for example by purchasing chocolate Easter eggs through them instead of through shops or web shops. In addition, we support local schools by donating free furniture. We also do our bit for inclusive employment through VDAB and SBS projects, where we help people with a distance to the labour market develop their skills and offer internships. In this way, we create opportunities together and strengthen our community.

5.9.2 Firm Transmoove:

"Transmoove spends part of its refurbishment and upholstery work on the social economy, notably Kunnig. It also has a structural collaboration with the circular economy: a far-reaching collaboration was developed with the umbrella organisation Vites. Support is also often provided to other small-scale, local, social causes: including (W)armkracht, Asiat, Villa Clementina, and a number of neighbourhood schools."

5.9.3 Schollaert firm

During company relocations, we rescue valuable items from landfills and donate them to organisations such as **De Kringwinkel** and other non-profit organisations. This way, furniture items and materials get a second life and we contribute to a circular and social economy.
Thanks to our close cooperation with De Kringwinkel, we ensure that large quantities of reusable goods find a new destination. These initiatives not only support sustainability, but also create opportunities for people in the social economy.

5.9.4 Firm De Roeck

At BKV, we work daily with employees of diverse nationalities, including Armenians, Syrians, Kosovars, Albanians, people with refugee status, Moroccans and Ukrainians. Our commitment to inclusion and diversity was awarded a Diversity Award - recognising our commitment to an inclusive workplace where everyone is given equal opportunities.

Curious about how we make a difference?

Read more about our collaboration and initiatives via the links below:

- Cooperation with De Kringwinkel
- LinkedIn update on our donations
- Facebook post about our community engagement
- Flanders Circular - Successful collaboration with social circular hubs
- Together we make impact - for a more sustainable and fairer society.

6. Governance

At BKV, good governance is at the heart of all activities. It forms the basis for reliability, transparency and professional services within the moving sector. In a sector still challenged by unfair competition and social fraud, the sector federation is strongly committed to initiatives that contribute to ethical, customer-oriented and sustainable business practices. In this chapter, we explain how BKV is working to strengthen consumer trust and increase service quality within the sector.

6.1 Our governance objectives

- We ensure a transparent and fair playing field in the moving industry by tackling social fraud, false self-employment and illegal subcontracting with the *Fair Competition Plan*.
- We cooperate with social inspectorates and provide them with the necessary resources, information and tools for better and more efficient inspections.
- We are developing an anonymous hotline where consumers, workers and members can report industry abuses.

6.2 Ethical business practices

Within BKV, reliability, professionalism and transparency are central. Yet the sector still too often faces unfair competition, such as companies without the proper permits or the use of undeclared work. This not only undermines workers' rights, but also creates an uneven playing field in which honest movers find it harder to compete.

To address this issue, the industry, in collaboration with the government, has introduced the Fair Competition Plan. This plan sets clear guidelines to counter unfair practices and ensure a transparent and fair moving industry.

6.2.1 Our principles for ethical business practices

BKV and its members maintain strict standards of ethics and business conduct. The core principles include:

- **Strict compliance with laws and regulations:** All licensed movers operate in full compliance with national and European regulations, including social and fiscal obligations. Accordingly, BKV members have not received any convictions or fines for corruption or bribery in the last five years.
- **Hotline:** To maintain ethical standards within our sector, moving organisations, employees and customers can report irregularities (anonymously) via the hotline at BKV. Complaints will always be dealt with and forwarded to the appropriate authorities if necessary.
- **Monitoring and certification:** Removals companies that are members of BKV are monitored for compliance with quality and licensing requirements, assuring consumers and businesses of a professional service.
- **Service transparency:** All BKV members work with clear quotations, clear pricing structures and fair contract terms to avoid deception and hidden costs.

6.2.2 Fair competition plan

The moving industry has long faced challenges such as social fraud and unfair competition. To address this and create a level playing field, the **Fair Competition Plan** was launched in 2024. This plan came about in cooperation between the BKV, social partners and the government and its main objective is to promote a **transparent and professional moving industry**. This will be achieved through the introduction of a legal framework making registration of companies and work locations mandatory, strict monitoring of compliance with social and fiscal obligations, and greater recognition of professional moving companies. The plan also provides clear guarantees for customers and supports inspection services with more efficient means of control.

The plan includes the following concrete measures:

- **Establishment of a registration system:** A competent authority will be in charge of registering and monitoring companies in the sector.
- **Mandatory attendance recording:** From 2026, work locations and attendance will be recorded digitally, significantly increasing control and transparency.
- **Improving inspections:** Stricter controls on subcontracting, sham self-employment and foreign PO Box companies are underway.
- **Customer awareness:** An information campaign should make customers aware of the importance of professional and registered movers.
- **Strengthening customer protection:** Customers will get more security through controlled safeguards for removal orders and clear communication of their rights.

6.2.3 BKV quality manual

BKV's quality manual[16] supports movers in increasing the quality and transparency of their services. It provides concrete guidelines that contribute to a professional, sustainable and customer-oriented sector. The handbook is based on European standards and translates them into practical tools and actions for movers. The handbook focuses on ten key areas, such as **customer focus, safety, packaging materials and internal organisation.**

One of the key elements is the self-assessment. Using 60 questions, movers gain insight into their strengths and areas of concern. This evaluation helps companies to continuously improve and manage risks, thus contributing the handbook to responsible operations. The handbook also contains checklists and customer satisfaction surveys that support movers in streamlining processes and increasing customer satisfaction.

6.3 Consumer protection

The moving industry is strongly committed to protecting their consumers. These include individuals as well as all types of organisations. Through initiatives such as the 'Approved Mover' label, a central hotline and additional insurance options, consumers' trust is strengthened and they are protected from unethical practices.

6.3.1 Certified Mover

The 'Erkend Verhuizer' or 'Approved Mover' label symbolises professionalism and reliability within the moving industry. This quality label, awarded by the Belgian Chamber of Removers (BKV), offers customers the assurance that they are working with a removals company that meets the highest standards.

Quality principles of an Approved Mover:

- **Compliance with legislation:** Working according to the standards of the BKV quality manual, respecting accounting, tax and social regulations.
- **Transparency:** Offering clear, detailed quotations and rates supported by BKV's general terms and conditions.
- **Correct execution:** Ensuring flawless and professional execution of all assignments.
- **Insurance and risk information:** Being correctly insured and clearly informing customers about potential risks and insurance options.
- **Skilled staff:** Only use well-trained, reliable and experienced staff.
- **Certified equipment:** use of safe vehicles, lifting equipment and tools that comply with technical inspection standards.
- **Sustainable packaging materials:** Application of environmentally friendly and appropriate packaging materials.
- **Furniture storage:** Careful management of entrusted items in specially equipped and secured storage areas.
- **Complaint handling:** Handle complaints correctly and keep invoices transparent.

To maintain this label, moving companies go through a qualification process, which includes self-assessments, customer reviews and demonstrating compliance with legal requirements, such as the use of P- and S-cards and having periodic inspections of ladder lifts, . Although controls within the moving industry are currently limited, BKV is committed to improvement through the *Fair Competition Plan*. This strengthens the industry and ensures that the label continues to stand for quality and consumer protection.

> “
>
> **The fight against unfair competition requires a joint effort. BKV therefore works closely with the government, inspectorates and social partners to tackle false self-employment, illegal subcontracting and undeclared work. Inspections and agreements ensure that the moving industry maintains a level playing field.**

[16]Source: https://bkv-cbd.be/realisaties/

6.3.2 Development of a central hotline

BKV is developing an anonymous hotline where consumers, workers and members can submit complaints about abuses within the industry. Currently, complaints can be reported through BKV's general lines. In 2023, 125 reports were forwarded to the social inspectorate SIOD, showing that this hotline plays an important role in tackling malpractices. These complaints mainly concern non-members of BKV. These complaints are handled in the same way as complaints about members. This may include, for example, lack of transport licences or non-transparency about prices.

The complaints are processed by BKV, by the secretary, and then taken to court if necessary.

6.3.3 Additional insurance options

The legal liability of movers is limited to €125 per cubic metre, which is not always enough to cover damages. To give consumers extra protection, they can take out additional insurance through www.verzekerjehuis.be. This insurance is a cooperation of BKV with the insurance agency Concordia. It guarantees quick payment of damages within five days, allowing customers to use moving services with confidence.

6.4 Digital transformation

The moving industry has traditionally relied heavily on manual and paper-based processes, which has limited digitisation to date. Yet digitisation offers a great opportunity to operate more efficiently and sustainably. By embracing new technologies, moving companies can not only improve their operational efficiency, but also contribute to the industry's sustainability goals. Yet there are also challenges. A key concern is cybersecurity. Digitising processes involves risks, such as data breaches and cyber attacks. To minimise these risks, it is essential to invest in good security systems and make employees aware of safe digital working.

We encourage our members to implement one or more of the following transformations

- **Paperless workflows:** Replacing paper documents with digital versions, such as contracts or inventory lists that customers can sign on a tablet, saves time and reduces paper consumption.
- **Process automation:** Planning and administrative tasks can be automated, which not only reduces errors but also increases efficiency.
- **Advanced logistics software:** Logistics planning systems help movers optimise routes, which not only lowers costs but also reduces vehicle CO_2 emissions.
- **Digital customer interaction:** customers can remotely complete and approve inventories via digital tools, which not only saves time but also offers greater convenience.

6.5 Certification

Besides the 'Erkend Verhuizer' label, which offers consumers a standard of reliability, there are also additional certifications that can help movers further professionalise their processes and performance. However, for most BKV members, namely smaller SMEs, certification is less common. This is because certification processes are time-intensive and costly.

In contrast, among larger players in the industry, we do see various certifications that contribute to quality, safety and environmental awareness, such as:

- **ISO 9001 - quality management**
- **ISO 14001 - management**
- **VCA - safety, health and environment.**
- **EMAS: Eco-Management and Audit Scheme**

7. Annexes

7.1 V-SME Table of contents

B1. Basis for preparation		Page	Notes
24a	Disclose which option is selected for reporting: - OPTION A: Basic module - OPTION B: Basic and extended module		Optie B
24b	Indicated data points not reported because it is considered classified or sensitive information (if applicable)		Not applicable
24c	Reporting on a consolidated or individual basis?		Sector level
24d	List of subsidiaries with registered address (if reporting on a consolidated basis)	9, 60	
24e.i.	Legal form of the company		NPO
24e.ii.	NACE sectoral classification code(s)		49.420
24e.iii.	Balance sheet total (in Euro);		€ 115.885.110,43
24e.iv.	Turnover (in euros)		€48.436.583
24e.v.	Number of employees in workforce		3.375
24e.vi.	Addresses of all sites	60	
24e.vii.	Geolocation of all sites	60	
25	Sustainability certification or labels including the issuers of the certification or label, date and rating score (if applicable)		Not applicable

B2: Actions, policies and future initiatives for the transition towards a more sustainable economy		Page	Notes
26a	Description of the specific actions introduced for the transition to a more sustainable economy.	22, 29, 31	CO_2-analysis
26b	Description of specific policy measures introduced for the transition to a sustainable economy.	24	
26c	Description of future initiatives introduced for the transition to a more sustainable economy.	22, 29, 31	CO_2-reduction actions, Transport actions, Waste reduction
26d	Description of the specific targets introduced for the transition to a more sustainable economy.	22	SDG, CO_2 reduction
28	If the company also reports on the extended module, it shall supplement the information provided under B2 with the data points listed in C2.		
C1. Business model en duurzaamheid		**Page**	**Notes**
47a	Beschrijving van de belangrijkste aangeboden producten en/of diensten	7	
47b	Beschrijving van de belangrijkste markt(en) waarin de onderneming actief is.	11	
47c	Beschrijving van de belangrijkste zakelijke relaties	11	
47d	Als de strategie sleutelelementen bevat die betrekking hebben op of van invloed zijn op duurzaamheidskwesties, een korte beschrijving van die sleutelelementen.		

V-SME Environment (Governance)

C2. Description of actions, policies and future initiatives for the transition towards a more sustainable economy		Page	Notes
48	If the company has implemented specific actions, policies or future initiatives for the transition to a more sustainable economy that it has already reported under disclosure B2 in the baseline module, it shall provide a brief description of these practices, policies or future initiatives.	22, 24, 29, 31	
49	Responsible for actions, policies, objectives and future initiatives (if applicable)		Koen Vangoidsenhoven
B3: Energy & greenhouse gas emissions		**Page**	**Notes**
29	Total electricity consumption in MWh		672,74
	Total electricity consumption in MWh - renewable		142,19
	Total electricity consumption in MWh - non-renewable		389,71
	Total fuel consumption in MWh		10321,88
	Total fuel consumption in MWh: Renewable		0,00
	Total fuel consumption in MWh: Non-renewable		10321,88
	Total energy consumption in MWh		10994,62
	Total energy consumption in MWh: renewable		142,19
	Total energy consumption in MWh: non-renewable		10852,43
30	Total greenhouse gas emissions (in tonnes CO_2e)		2.623,58
30a	Scope 1 greenhouse gas emissions (in tonnes CO_2e)		2.431,27
30b	Scope 2 site-specific greenhouse gas emissions (in tonnes CO_2e)		66,32
31	Greenhouse gas intensity based on turnover (in tCO_2e/ 10K euro)		0,62

B4. Pollution of air, water and soil		Page	Notes
32	Type of pollutants emitted from activities in air, water and soil and respective amounts per pollutant.	58	

B5. Biodiversity		Page	Notes
33	The number and area (in hectares) of sites owned, leased, or managed by the organisation that are in or near biodiversity-sensitive areas		Not material
34a	Total land use (in hectares)		
34b	Total sealed area		
34c	Total nature-oriented area on the site		
34d	Total nature-oriented area (off)site		

B6. Water		Page	Notes
35	The total amount of water withdrawal		Not material
	Total amount of water abstracted at sites in high water stress areas		
36	In case production processes are present, state the water consumption calculated as the difference between water withdrawal and water discharge from the production processes.		

B7. Resource use, circular economy and waste management		Page	Notes
37	Do you apply the principles of circular economy? If so, how are these principles applied?	31	
38a	Total annual non-hazardous waste generation (in tonnes)		6.506,86
	Total annual hazardous waste generation (in tonnes)		0,00
38b	Total annual waste recycled or reused		No data available
38c	If the company operates in a sector that uses significant material flows (e.g. manufacturing, construction, packaging or other), the annual mass flow of relevant materials used.		

C3. Greenhouse gas reduction targets & climate transition plan		Page	Notes
54a	Reduction target with year of target (with units used)	22, 24	
	Base year and value for reduction target (with units used)		Base year is 2023
54c	The proportion of scope 1, scope 2 and scope 3 (if applicable) emissions covered by the target.	22	
54d	List of key actions it intends to take to achieve its objectives.	24, 25	
54e	If you operate in the high-impact sector (NACE) and you already have a transition plan for climate change mitigation. How will you contribute to reducing greenhouse gas emissions?	24, 25	
56	If it operates in the high-impact sector (NACE), but there is no transition plan yet, when will the plan be adopted?		Not applicable

C4. Climate risks		Page	Notes
57	Description of climate-related transitions or risks (if identified)	27	
57b	Description of how the company has assessed the exposure and sensitivity to this transition or risks of its assets, operations and value chain.	27	
57c	Period these transitions and risks will take place	27	
57d	Climate change adaptation measures undertaken in the context of these climate-related risks and transitions.	27	
58	Potential negative impact of physical risk that may affect its financial performance or business activities in the short, medium or long term, with an indication of whether the company considers the risk high/medium/low.	27	

V-SME Social

B8. Staff - general characteristics		Page	Notes
39a	Number of employees by type of contract - open-ended		Data not available
	Number of employees by type of contract - fixed term		Data not available
39b	Number of employees by gender - male		3055
	Number of employees by gender - female		320
39c	Number of employees by employment contract country - Belgium		3375
40	Employee attrition rate (if > 50 employees)		N/A
B9. Staff - Health and safety		**Page**	**Notes**
41a	Number of registered workplace accidents		15
41b	Number of fatalities due to work-related injuries or health problems		0
B10. Staff - Compensation, collective bargaining and training		**Page**	**Notes**
42a	Do employees receive a wage equal to or higher than the applicable minimum wage based on the collective bargaining agreement or national law?		Yes (collective bargaining agreement)
42b	The percentage difference in pay between female and male employees (if > 150 employees)		N/A
42c	Percentage of employees covered by collective bargaining agreement		100%
42d	Average number of training hours per employee		0.80 hours per annum via Ambassador

42d	Average number of training hours per employee		0.80 hours per annum via Ambassador
	Average number of training hours per employee broken down by gender - male		Data not available
	Average number of training hours per employee broken down by gender - female		Data not available
	C5. Additional staff characteristics	**Page**	**Notes**
	Female-to-male ratio at management level (if > 50 employees)		BKV: 1:1
	Number of self-employed persons without personnel working exclusively for the enterprise and agency workers mainly engaged in "labour activities" (if > 50 employees)		1183
	C6. Human rights policies and processes	**Page**	**Notes**
	Does the company have a code of conduct or human rights policy for its own staff? (YES/ NO)		Yes
	If yes, does this apply to: Child labour (yes/no)		Yes
	If yes, does this apply to: Forced labour (yes/no)		Yes
	If yes, does this apply to: human trafficking (yes/no)		Yes
	If yes, does this apply to: discrimination (yes/no)		Yes
	If yes, does this apply to: accident prevention (yes/no)		Yes
	If yes: does this apply to: other (to be added by yourself)		/
	Is there a complaint handling mechanism for in-house staff? (Yes/No)		Yes

42d	C7. Serious negative incidents related to human rights	Page	Notes
	Are there any confirmed incidents related to child labour? (yes/no)		No
	Are there any confirmed incidents related to forced labour? (yes/no)		No
	Are there any confirmed incidents related to human trafficking (yes/no)?		No
	Are there any confirmed incidents of discrimination (yes/no)?		No
	Other? (If yes, please specify)		No
	If yes, describe the actions taken to address these incidents		No
	If yes: does this apply to: other (to be added by yourself)		/
	Is the company aware of confirmed incidents among employees in the value chain, affected communities, consumers and end-users? If yes, please explain.		No

V-SME governance

B11. Convictions and fines for corruption and bribery		Page	Notes
43	In case of convictions and fines in the reporting period, the company discloses the number of convictions and the total amount of fines imposed for violation of anti-corruption and anti-bribery laws.		0

C8. Revenues from certain sectors and exclusion from EU reference benachmarks		Page	Notes
63a	If active in this sector: revenues from controversial weapons		Not material
63b	If active in this sector: income from cultivation and production of tobacco		
63c	If active in this sector: fossil fuel revenues (breakdown of coal, oil and gas revenues)		
63d	If active in this sector: income from the production of chemicals		
64	The company discloses whether it is excluded from EU reference benchmarks consistent with the Paris Agreement.		

C9. Gender diversity in governing body		Page	Notes
65	Gender diversity ratio board of directors (if company has a governing body)		Different for each company

Annex: air pollution

The participating members collectively produced the air pollution below, broken down by type. 95% of this air pollution was caused by diesel combustion.

Category	Consumption (MWh)	CO tonnes	NMVOCs tonne	NO_x tonne	SO_2 tonnes	PM_{10} tonnes	$PM_{2.5}$ tonnes
Stationary combustion	865	0,11	0,07	0,48	0,03	0,01	0,01
Gas	705	0,07	0,06	0,19	0,00	0,00	0,00
Fuel oil	160	0,04	0,01	0,30	0,03	0,01	0,01
Mobile combustion	9456	31,69	3,02	5,89	30,64	3,98	3,68
Diesel	9044	30,31	2,89	5,63	29,30	3,81	3,52
Petrol	371	1,24	0,12	0,23	1,20	0,16	0,14
Equivis ZS 46	0,7	0,002	0,0002	0,0004	0,0022	0,0003	0,0003
Fuel oil	42	0,14	0,01	0,03	0,13	0,02	0,02
Total	**10322**	**31,81**	**3,10**	**6,37**	**30,67**	**4,00**	**3,69**

Table Air pollution from participating organisation. Source: Climate & Clean Air Coalition & Stockholm Environmental Institute.
The calculation was made based on the combustion of gaseous-form and liquid fuels for stationary combustion.

7.2 About this report

This report, prepared in accordance with Voluntary SME reporting standards (V-SME), provides an in-depth analysis of BKV's objectives and progress on environmental sustainability, social initiatives and governance. We have used our VSRS materiality assessment, alongside key frameworks such as the Sustainability Accounting Standards Board (SASB) Standard and the Greenhouse Gas (GHG) Protocol, to shape the content of this report.

In this report, "materiality" refers to the importance of certain topics to BKV and our stakeholders, including customers, employees, suppliers, communities and investors. These material topics, as outlined by the VSRS, represent important environmental, social and governance issues relevant to our operations.

BKV and The Ecological Entrepreneur (World's Natural Balance BV) are not responsible if the results in this report are incorrect due to poor, or incomplete data provided by participating organisations. We are not liable for any direct or indirect claims arising from this analysis.

This document describes the activities and initiatives of BKV and its members from 1 January 2022 to 31 December 2023.

7.3 Endnotes

BKV. (2025, January 12). About us: who is BKV. BKV-CBD. Retrieved February 20, 2025, from https://bkv-cbd.be/over-ons/

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7.4 Participating organisations

Company name	Contact	Company number	Address	Geolocations
2Eco	- Ward Demaere - Sam Van Treeck	BE0736390445	Lijkveldestraat 23B/1 9170 Sint-Gillis-Waas	(51.2196, 4.1006)
ABC Verhuizers	- Laurens Schelstraete	BE1002938230	Beyntellus 5 B-2360 Oud Turnhout	(51.3090, 4.9922)
De Roeck	- Axelle De Roeck - Danny Maris	BE0404944613	Straatsburgdok Noordkaai 21 2030 Antwerpen	(51.2365, 4.4218)
Dockx Movers	- Sarah Dockx - Elke Moortgat	BE0430660697	Terbekehofdreef 12 2610 Wilrijk, België	(51.1784, 4.3972)
Fossoul	- Raphaël Fossoul	BE0401451029	Rue de Nouvelles Technologies 17 4460 Grâce-Hollogne	(50.6440, 5.4940)
Mozer	- Olivier Mozer	BE0472010908	Theodoor Swartsstraat 3 3070 Kortenberg	(50.8860, 4.5436)
Neetens	- Dieter De Martelaere	BE0884243387	Wijngaardveld 9 C 9300 Aalst	(50.9346, 4.0505)
Patar	- Estelle Patar	BE0402641357	Rue des Coteaux 1030 Schaerbeek	(50.8645, 4.3760)
Schollaert	- Thibaut Schollaert	BE0804458513	Logboekstraat 2 9000 Gent	(51.0605, 3.7190)
Transmoove	- Mathieu Vanhoucke	BE0472500163	J Monnetlaan 1a 1804 Vilvoorde	(50.9090, 4.4230)
Verhuizingen Coppens	- Tim Coppens	BE0463.351.875	Leuvensesteenweg 204 3370 Boutersem	(50.8330, 4.8310)
Verhuizingen Renders	- Steven Claes	BE0431.385.724	D'Helst 30 9280 Lebbeke	(51.0000, 4.1330)
Putters International	- Nassera Gharmaoui	BE 0459.618.167	Erasmuslaan 30 1804 Zemst	(50.9352, 4.4238)
EXPMoving	- Marianne Benoit	BE 0645.876.577	Sterrebeekstraat 176 bus D 1930 Zaventem	(50.8825, 4.4906)
HGMN Transport & Services	- David Tissaen - Stephane Haegeman	BE 0750.678.842	Rue des Mésanges 8 4217 Héron	(50.5589, 5.1160)

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