



**MARKET ACCESS SECRETARIAT  
Global Analysis Report**

# Competitive Trade Analysis

## Netherlands

**March 2016**



### REPORT CONTENT SUMMARY

- This report looks to highlight the major sectors in the Netherlands, and attempts to identify the best opportunities for Canadian exports.
- Specifically, the data analysis that follows focuses on the top ten Dutch imports by major aggregate sector, of which Canada is a supplier or has the capacity to supply. It identifies the gap between the Netherlands' imports from the world and the proportion provided by Canada, and then outlines top international competitors.
- Unless otherwise specified, all figures in this document are based on import data as reported by Eurostat, and were sourced from Global Trade Atlas (2015).

### NETHERLANDS MARKET SUMMARY

- The Netherlands is the sixth-largest importer of agri-food and seafood products in the world, and the third-largest among members of the European Union (EU) with C\$76.9 billion in 2014. The Netherlands is also the world's second-largest agri-food and seafood exporter (first among EU members) with C\$120.0 billion in the same year. They also recorded a trade surplus of C\$43.1 billion in 2014.
- Top agri-food and seafood suppliers include Germany with 17.9% of total import value, Belgium (12.1%), and Brazil (6.8%). Canada was the Netherlands' 45<sup>th</sup>-largest import provider in 2014, representing C\$324.5 million, or just 0.4% of the market.

*Note: Please see the Annex at the end of this document for a list of abbreviations that will be used throughout this report.*

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## TRADE OVERVIEW

The Netherlands is the sixth-largest importer of agri-food and seafood products in the world and the second-largest exporter. It also ranks as the third-largest importer and first-largest exporter among EU member states. The country recorded an agri-food and seafood trade surplus of C\$43.1 billion in 2014, with imports valued at just over C\$76.9 billion and C\$120.0 billion in exports. Sourcing a diverse range of agri-food and seafood products from international suppliers, key import commodities include edible fruit and nuts (9.7% of total imports), food waste and animal feed (7.5%) and meat and edible offal (7.3%). The top three supplying countries of overall agri-food and seafood imports are Germany, Belgium and Brazil. Canada is ranked 45<sup>th</sup> among supplying countries to the Netherlands with imports values at C\$324.5 million in 2014.

### Netherlands' Top Ten Suppliers of Agri-Food and Seafood Products, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>57,509.54</b>	<b>67,006.60</b>	<b>66,417.33</b>	<b>73,023.41</b>	<b>76,970.98</b>	<b>7.56</b>
1   Germany	10,247.95	12,241.55	12,274.30	13,229.78	13,766.33	7.66
2   Belgium	7,265.98	8,492.01	8,244.41	8,960.01	9,313.61	6.40
3   Brazil	4,206.04	4,710.21	4,811.72	5,546.81	5,240.39	5.65
4   France	4,868.31	5,216.45	4,791.43	5,135.43	5,199.17	1.66
5   United States	1,937.52	2,065.55	2,176.53	2,669.29	3,120.70	12.66
6   United Kingdom	2,047.00	2,706.42	2,578.97	2,804.28	3,109.84	11.02
7   Spain	2,042.03	2,048.95	2,031.87	2,373.77	2,571.34	5.93
8   Italy	1,436.78	1,520.55	1,456.64	1,633.69	1,908.98	7.36
9   Argentina	1,991.26	2,071.66	1,826.15	1,837.89	1,904.38	-1.11
10   Poland	1,190.43	1,341.98	1,387.25	1,609.56	1,549.43	6.81
45   Canada	257.48	440.43	353.54	409.78	324.51	5.95

### Netherlands' Top Ten Suppliers of Agri-Food and Seafood Products, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
1   Germany	17.82	18.27	18.48	18.12	17.89	0.07
2   Belgium	12.63	12.67	12.41	12.27	12.10	-0.53
3   Brazil	7.31	7.03	7.24	7.60	6.81	-0.50
4   France	8.47	7.78	7.21	7.03	6.75	-1.72
5   United States	3.37	3.08	3.28	3.66	4.05	0.68
6   United Kingdom	3.56	4.04	3.88	3.84	4.04	0.48
7   Spain	3.55	3.06	3.06	3.25	3.34	-0.21
8   Italy	2.50	2.27	2.19	2.24	2.48	-0.02
9   Argentina	3.46	3.09	2.75	2.52	2.47	-0.99
10   Poland	2.07	2.00	2.09	2.20	2.01	-0.06
45   Canada	0.45	0.66	0.53	0.56	0.42	-0.03



Canada has a substantial supply gap with the Netherlands that has been increasing at rate identical to the Netherlands' agri-food and seafood import growth. Canada holds just marginal market share in each of the Netherlands' top ten import commodities, presenting opportunities to further supply the country's growing demand. This may prove particularly true in light of the Canada-European Union Comprehensive Economic and Trade Agreement (CETA). In particular, since the port of Rotterdam is an important entry point into the European Union, the CETA deal may lead to substantially higher imports for further transit. However, while the Netherlands has a diverse supplier list, totalling 205 countries in 2014, their primary trading partners are fellow members of the European Union (representing seven of the top ten suppliers, or 48.6% of the market), signalling a very concentrated supply environment.

#### Agri-Food and Seafood Products Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Netherlands' imports from the world	57,509.54	67,006.60	66,417.33	73,023.41	76,970.98	7.56
Netherlands' imports from Canada	257.48	440.43	353.54	409.78	324.51	5.95
Supply gap	57,252.06	66,566.17	66,063.79	72,613.62	76,646.47	7.57

Edible fruit and nuts represented the Netherlands' top-grossing import commodity in 2014, with a value of over C\$7.4 billion, or 9.7% of overall agri-food and seafood imports. Across the 2010 to 2014 period, edible fruit and nuts was an average performer in terms of value sales growth, with a compound annual growth rate (CAGR) of 7.8%. The tenth-largest category of fish and crustaceans registered sales of C\$3.4 billion in 2014, and was the strongest-growing commodity over the review period with a CAGR of 9.4%.

#### Netherlands' Top Ten Agri-Food and Seafood Commodity Imports from the World, C\$ Millions

Rank	HS Code	Commodity	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>Total Agri-Food and Seafood Imports</b>			<b>57,509.54</b>	<b>67,006.60</b>	<b>66,417.33</b>	<b>73,023.41</b>	<b>76,970.98</b>	<b>7.56</b>
1	08	Edible fruit and nuts	5,546.45	5,910.69	5,863.23	6,803.01	7,486.79	7.79
2	23	Food waste and animal feed	4,224.06	4,806.80	5,176.18	5,820.45	5,762.57	8.07
3	02	Meat and edible offal	4,338.45	4,980.18	4,982.14	5,192.46	5,633.32	6.75
4	12	Oilseeds	3,756.32	4,935.18	4,678.03	5,443.01	5,133.15	8.12
5	04	Dairy, eggs and honey	3,784.87	4,220.02	4,034.56	4,745.08	5,032.72	7.38
6	18	Cocoa and cocoa preparations	3,986.29	4,531.96	3,431.19	3,802.15	4,874.64	5.16
7	22	Beverages	3,589.36	4,107.71	3,995.98	4,525.69	4,647.85	6.67
8	20	Prepared vegetables, fruit and nuts	2,979.05	3,331.62	3,270.71	3,581.75	3,896.33	6.94
9	10	Cereals	2,618.60	3,332.30	3,337.14	3,854.98	3,697.95	9.01
10	03	Fish and crustaceans	2,397.52	2,712.59	2,675.08	2,798.62	3,437.49	9.43



## TOP TEN AGRI-FOOD AND SEAFOOD COMMODITY IMPORTS

### 1. EDIBLE FRUIT AND NUTS

Netherlands' Top Ten Suppliers of Edible Fruit and Nuts, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>5,546.45</b>	<b>5,910.69</b>	<b>5,863.23</b>	<b>6,803.01</b>	<b>7,486.79</b>	<b>7.79</b>
South Africa	854.69	771.40	808.95	992.09	997.77	3.95
Spain	496.24	507.63	514.07	598.22	679.03	8.16
Chile	445.55	583.81	518.36	648.60	635.39	9.28
Brazil	323.43	346.09	363.95	406.62	431.25	7.46
United States	258.52	267.41	271.29	311.94	399.39	11.49
Peru	150.86	211.35	224.24	323.80	393.76	27.11
Germany	172.61	188.56	218.06	281.37	374.84	21.39
Costa Rica	193.17	230.38	231.90	263.17	373.48	17.92
Belgium	427.24	459.98	360.70	360.71	372.12	-3.39
Vietnam	156.17	210.64	192.52	161.62	220.92	9.06
Canada (44)	11.11	20.33	21.99	16.28	16.85	10.98

Netherlands' Top Ten Suppliers of Edible Fruit and Nuts, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
South Africa	15.41	13.05	13.80	14.58	13.33	-2.08
Spain	8.95	8.59	8.77	8.79	9.07	0.12
Chile	8.03	9.88	8.84	9.53	8.49	0.46
Brazil	5.83	5.86	6.21	5.98	5.76	-0.07
United States	4.66	4.52	4.63	4.59	5.33	0.67
Peru	2.72	3.58	3.82	4.76	5.26	2.54
Germany	3.11	3.19	3.72	4.14	5.01	1.90
Costa Rica	3.48	3.90	3.96	3.87	4.99	1.51
Belgium	7.70	7.78	6.15	5.30	4.97	-2.73
Vietnam	2.82	3.56	3.28	2.38	2.95	0.13
Canada (44)	0.20	0.34	0.37	0.24	0.23	0.03



### Edible Fruit and Nuts Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Netherlands' imports from the world	5,546.45	5,910.69	5,863.23	6,803.01	7,486.79	7.79
Netherlands' imports from Canada	11.11	20.33	21.99	16.28	16.85	10.98
Supply gap	5,535.34	5,890.36	5,841.24	6,786.73	7,469.94	7.78

### Netherlands' Top Five Edible Fruit and Nut Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
080610	Fresh grapes	861.28	969.90	1,099.20	12.97
080510	Fresh oranges	350.76	428.91	405.50	7.52
080440	Fresh or dried avocados	233.63	335.06	362.01	24.48
080132	Fresh, dried or shelled cashews	315.69	281.34	354.24	5.93
080390	Fresh or dried bananas	229.86	299.84	349.95	23.39

### Netherlands' Top Five Edible Fruit and Nut Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
080610	Fresh grapes	South Africa 35.95	Chile 19.04	Peru 13.89	N/A
080510	Fresh oranges	South Africa 41.40	Spain 20.63	Egypt 9.74	N/A
080440	Fresh or dried avocados	Peru 26.42	South Africa 21.82	Chile 20.36	N/A
080132	Fresh, dried or shelled cashews	Vietnam 57.09	India 19.81	Brazil 7.96	N/A
080390	Fresh or dried bananas	Ecuador 26.57	Germany 25.26	Colombia 17.80	N/A



## 2. FOOD WASTE AND ANIMAL FEED

**Netherlands' Top Ten Suppliers of Food Waste and Animal Feed, C\$ Millions**

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>4,224.06</b>	<b>4,806.80</b>	<b>5,176.18</b>	<b>5,820.45</b>	<b>5,762.57</b>	<b>8.07</b>
Brazil	1,277.02	1,413.40	1,676.69	1,952.30	1,697.59	7.38
Germany	694.88	885.44	1,073.71	1,181.43	1,137.20	13.10
Argentina	1,093.54	999.68	804.19	837.14	921.32	-4.19
Belgium	361.41	431.16	466.84	550.88	470.99	6.84
France	245.05	306.73	310.61	309.89	320.27	6.92
Paraguay	-	-	-	-	180.38	N/C
Indonesia	69.25	146.57	145.85	159.89	174.17	25.93
United Kingdom	52.59	68.92	99.05	117.89	141.92	28.17
United States	79.88	142.24	127.12	101.17	93.48	4.01
Ukraine	5.63	15.82	51.92	56.98	90.61	100.25
Canada (33)	1.93	8.21	2.82	2.37	3.49	15.91

**Netherlands' Top Ten Suppliers of Food Waste and Animal Feed, % Share**

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Brazil	30.23	29.40	32.39	33.54	29.46	-0.77
Germany	16.45	18.42	20.74	20.30	19.73	3.28
Argentina	25.89	20.80	15.54	14.38	15.99	-9.90
Belgium	8.56	8.97	9.02	9.46	8.17	-0.39
France	5.80	6.38	6.00	5.32	5.56	-0.24
Paraguay	0.00	0.00	0.00	0.00	3.13	3.13
Indonesia	1.64	3.05	2.82	2.75	3.02	1.38
United Kingdom	1.25	1.43	1.91	2.03	2.46	1.21
United States	1.89	2.96	2.46	1.74	1.62	-0.27
Ukraine	0.13	0.33	1.00	0.98	1.57	1.44
Canada (33)	0.05	0.17	0.05	0.04	0.06	0.01

**Food Waste and Animal Feed Supply Gap, C\$ Millions**

	2010	2011	2012	2013	2014	CAGR % 2010-14
Netherlands' imports from the world	4,224.06	4,806.80	5,176.18	5,820.45	5,762.57	8.07
Netherlands' imports from Canada	1.93	8.21	2.82	2.37	3.49	15.91
Supply gap	4,222.12	4,798.58	5,173.37	5,818.08	5,759.07	8.07



**Netherlands' Top Five Food Waste and Animal Feed Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
230400	Soybean oilcake and other solid residue, whether or not ground or pelletized	2,391.92	2,772.87	2,793.96	8.08
230990	Animal feed preparations, except dog and cat food put up for retail sale	767.91	731.64	723.64	-2.93
230910	Dog and cat food put up for retail sale	326.28	333.82	475.84	20.76
230641	Canola seed oilcake and other solid residue, low erucic acid whether or not ground	264.69	312.80	299.67	6.40
230660	Palm nut or kernel oilcake and solid residue, whether or not ground or pelletized	252.43	266.38	271.10	3.63

**Netherlands' Top Five Food Waste and Animal Feed Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
230400	Soybean oilcake and other solid residue, whether or not ground or pelletized	Brazil 58.16	Argentina 28.45	Paraguay 6.46	N/A
230990	Animal feed preparations, except dog and cat food put up for retail sale	Germany 34.07	Belgium 25.08	France 12.56	0.17
230910	Dog and cat food put up for retail sale	Germany 30.49	France 14.30	United Kingdom 12.40	0.40
230641	Canola seed oilcake and other solid residue, low erucic acid whether or not ground	Germany 80.33	Belgium 11.46	France 5.19	N/A
230660	Palm nut or kernel oilcake and solid residue, whether or not ground or pelletized	Indonesia 62.67	Germany 29.37	Malaysia 7.95	N/A



### 3. MEAT AND EDIBLE OFFAL

**Netherlands' Top Ten Suppliers of Meat and Edible Offal, C\$ Millions**

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>4,338.45</b>	<b>4,980.18</b>	<b>4,982.14</b>	<b>5,192.46</b>	<b>5,633.32</b>	<b>6.75</b>
Germany	1,115.51	1,175.75	1,215.25	1,341.61	1,389.05	5.64
Belgium	721.58	761.31	702.74	670.80	730.86	0.32
Brazil	631.74	748.03	624.80	642.31	652.83	0.82
United Kingdom	288.24	392.20	379.01	356.36	363.09	5.94
Poland	240.79	239.48	314.10	323.60	299.09	5.57
New Zealand	116.60	255.78	250.49	241.41	292.05	25.80
Ireland	200.44	197.88	205.53	234.08	287.76	9.46
Argentina	163.21	175.64	152.00	168.96	209.15	6.40
Thailand	-	0.47	53.72	112.04	187.12	N/C
Uruguay	83.42	76.82	90.69	120.54	178.35	20.92
Canada (28)	1.23	5.59	4.72	4.09	4.65	39.47

**Netherlands' Top Ten Suppliers of Meat and Edible Offal, % Share**

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	25.71	23.61	24.39	25.84	24.66	-1.05
Belgium	16.63	15.29	14.11	12.92	12.97	-3.66
Brazil	14.56	15.02	12.54	12.37	11.59	-2.97
United Kingdom	6.64	7.88	7.61	6.86	6.45	-0.19
Poland	5.55	4.81	6.30	6.23	5.31	-0.24
New Zealand	2.69	5.14	5.03	4.65	5.18	2.49
Ireland	4.62	3.97	4.13	4.51	5.11	0.49
Argentina	3.76	3.53	3.05	3.25	3.71	-0.05
Thailand	0.00	0.01	1.08	2.16	3.32	3.32
Uruguay	1.92	1.54	1.82	2.32	3.17	1.25
Canada (28)	0.03	0.11	0.09	0.08	0.08	0.05

**Meat and Edible Offal Supply Gap, C\$ Millions**

	2010	2011	2012	2013	2014	CAGR % 2010-14
Netherlands' imports from the world	4,338.45	4,980.18	4,982.14	5,192.46	5,633.32	6.75
Netherlands' imports from Canada	1.23	5.59	4.72	4.09	4.65	39.47
Supply gap	4,337.22	4,974.59	4,977.43	5,188.37	5,628.67	6.73





**Netherlands' Top Five Meat and Edible Offal Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
020130	Fresh/chilled boneless beef	695.45	804.75	939.30	16.22
021099	Salted, in brine, dried, smoked, including edible flours and meal meat and offal, not elsewhere specified	467.28	506.11	593.04	12.66
020110	Fresh/chilled beef carcasses and half-carcasses	574.25	514.09	447.57	-11.72
020120	Fresh/chilled beef cuts with bone-in	401.84	352.63	418.14	2.01
020319	Fresh/chilled pork	390.08	384.76	357.78	-4.23

**Netherlands' Top Five Meat and Edible Offal Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
020130	Fresh/chilled boneless beef	Argentina 19.49	Uruguay 13.99	Ireland 13.49	0.49
021099	Salted, in brine, dried, smoked, including edible flours and meal meat and offal, not elsewhere specified	Brazil 62.32	Thailand 29.47	United Kingdom 3.63	N/A
020110	Fresh/chilled beef carcasses and half-carcasses	Germany 25.63	Poland 19.01	Belgium 12.00	N/A
020120	Fresh/chilled beef cuts with bone-in	Germany 33.44	United Kingdom 10.99	Poland 10.76	N/A
020319	Fresh/chilled pork	Germany 72.93	France 7.34	Belgium 5.47	N/A



#### 4. OILSEEDS

*\*including seeds for sowing and fodder*

##### Netherlands' Top Ten Suppliers of Oilseeds, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>3,756.32</b>	<b>4,935.18</b>	<b>4,678.03</b>	<b>5,443.01</b>	<b>5,133.15</b>	<b>8.12</b>
United States	603.63	448.51	587.37	961.12	1,127.01	16.89
Brazil	642.22	571.80	630.91	853.16	917.75	9.34
Argentina	253.89	322.25	409.92	307.81	324.27	6.31
Australia	42.61	398.25	418.16	307.71	312.52	64.57
Germany	254.26	715.81	573.52	242.33	307.52	4.87
France	385.18	323.53	165.55	190.85	226.97	-12.39
Bulgaria	44.04	165.57	89.25	171.78	178.57	41.91
Paraguay	237.43	340.13	258.77	219.88	157.03	-9.82
China	106.85	130.60	153.53	136.19	154.16	9.60
Romania	113.96	228.23	54.63	165.68	135.56	4.43
Canada (16)	141.87	270.80	215.71	268.74	71.26	-15.82

##### Netherlands' Top Ten Suppliers of Oilseeds, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
United States	16.07	9.09	12.56	17.66	21.96	5.89
Brazil	17.10	11.59	13.49	15.67	17.88	0.78
Argentina	6.76	6.53	8.76	5.66	6.32	-0.44
Australia	1.13	8.07	8.94	5.65	6.09	4.96
Germany	6.77	14.50	12.26	4.45	5.99	-0.78
France	10.25	6.56	3.54	3.51	4.42	-5.83
Bulgaria	1.17	3.35	1.91	3.16	3.48	2.31
Paraguay	6.32	6.89	5.53	4.04	3.06	-3.26
China	2.84	2.65	3.28	2.50	3.00	0.16
Romania	3.03	4.62	1.17	3.04	2.64	-0.39
Canada (16)	3.78	5.49	4.61	4.94	1.39	-2.39



### Oilseeds Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Netherlands' imports from the world	3,756.32	4,935.18	4,678.03	5,443.01	5,133.15	8.12
Netherlands' imports from Canada	141.87	270.80	215.71	268.74	71.26	-15.82
Supply gap	3,614.45	4,664.38	4,462.32	5,174.27	5,061.89	8.78

### Netherlands' Top Five Oilseed Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
120190	Soybeans, other than seed	1,589.04	1,985.90	1,732.80	4.43
120510	Canola seeds	1,064.65	969.49	742.25	-16.50
120242	Shelled peanuts, not elsewhere specified	635.24	608.83	547.41	-7.17
120991	Vegetable seeds for sowing	372.22	419.38	448.18	9.73
120600	Sunflower seeds	298.15	398.02	339.58	6.72

### Netherlands' Top Five Oilseed Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
120190	Soybeans, other than seed	United States 42.97	Brazil 41.73	Paraguay 8.74	2.33
120510	Canola seeds	Australia 27.33	Ukraine 13.21	Germany 11.09	N/A
120242	Shelled peanuts, not elsewhere specified	Argentina 50.32	United States 21.19	Germany 8.05	N/A
120991	Vegetable seeds for sowing	France 17.59	United States 14.04	China 9.11	<0.01
120600	Sunflower seeds	Bulgaria 35.36	Romania 20.84	Hungary 16.81	N/A



## 5. DAIRY, EGGS AND HONEY

**Netherlands' Top Ten Suppliers of Dairy, Eggs and Honey, C\$ Millions**

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>3,784.87</b>	<b>4,220.02</b>	<b>4,034.56</b>	<b>4,745.08</b>	<b>5,032.72</b>	<b>7.38</b>
Germany	1,649.41	1,912.87	1,733.92	2,154.43	2,220.87	7.72
Belgium	618.09	753.62	718.33	730.53	770.78	5.67
France	409.50	421.69	400.68	424.14	522.68	6.29
United Kingdom	196.73	234.14	241.39	240.58	262.88	7.52
Poland	165.43	188.84	214.22	303.33	239.19	9.66
Ireland	159.40	157.63	141.33	139.20	207.99	6.88
Denmark	121.35	142.58	157.18	179.67	167.42	8.38
Italy	147.97	92.20	100.06	137.52	160.33	2.03
New Zealand	30.06	29.08	81.59	74.43	84.24	29.39
Spain	62.14	63.20	46.57	62.81	79.03	6.19
Canada (42)	2.70	0.34	0.00	0.01	0.14	-52.23

**Netherlands' Top Ten Suppliers of Dairy, Eggs and Honey, % Share**

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	43.58	45.33	42.98	45.40	44.13	0.55
Belgium	16.33	17.86	17.80	15.40	15.32	-1.01
France	10.82	9.99	9.93	8.94	10.39	-0.43
United Kingdom	5.20	5.55	5.98	5.07	5.22	0.02
Poland	4.37	4.47	5.31	6.39	4.75	0.38
Ireland	4.21	3.74	3.50	2.93	4.13	-0.08
Denmark	3.21	3.38	3.90	3.79	3.33	0.12
Italy	3.91	2.18	2.48	2.90	3.19	-0.72
New Zealand	0.79	0.69	2.02	1.57	1.67	0.88
Spain	1.64	1.50	1.15	1.32	1.57	-0.07
Canada (42)	0.07	0.01	0.00	0.00	0.00	-0.07

**Dairy, Eggs and Honey Supply Gap, C\$ Millions**

	2010	2011	2012	2013	2014	CAGR % 2010-14
Netherlands' imports from the world	3,784.87	4,220.02	4,034.56	4,745.08	5,032.72	7.38
Netherlands' imports from Canada	2.70	0.34	0.00	0.01	0.14	-52.23
Supply gap	3,782.17	4,219.69	4,034.55	4,745.07	5,032.57	7.40



**Netherlands' Top Five Dairy, Eggs and Honey Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
040690	Cheese, including cheddar and Colby, not elsewhere specified	569.45	668.07	769.41	16.24%
040410	Whey and modified whey, whether or not concentrated or containing added sweeteners	624.18	700.70	687.11	4.92%
040510	Butter	245.53	263.68	344.20	18.40%
040210	Milk and cream in solid forms (powder, granules, etc.), ≤1.5% fat content by weight	262.19	303.45	301.13	7.17%
040721	Fresh chicken eggs	212.50	242.67	287.87	16.39%

**Netherlands' Top Five Dairy, Eggs and Honey Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
040690	Cheese, including cheddar and Colby, not elsewhere specified	Germany 41.28	Belgium 15.19	United Kingdom 11.36	N/A
040410	Whey and modified whey, whether or not concentrated or containing added sweeteners	Germany 49.12	France 15.89	Italy 8.03	0.02
040510	Butter	Germany 23.93	Ireland 23.82	New Zealand 17.01	N/A
040210	Milk and cream in solid forms (powder, granules, etc.), ≤1.5% fat content by weight	Germany 29.41	France 20.38	Poland 11.18	<0.01
040721	Fresh chicken eggs	Germany 43.36	Poland 24.34	Belgium 18.06	N/A



## 6. COCOA AND COCOA PREPARATIONS

Netherlands' Top Ten Suppliers of Cocoa and Cocoa Preparations, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>3,986.29</b>	<b>4,531.96</b>	<b>3,431.19</b>	<b>3,802.15</b>	<b>4,874.64</b>	<b>5.16</b>
Côte d'Ivoire	1,099.25	1,274.38	880.05	918.21	1,107.84	0.19
Ghana	558.27	830.64	594.65	543.19	719.94	6.56
Belgium	321.66	383.88	366.52	456.08	539.93	13.82
Nigeria	399.36	426.90	264.15	370.76	460.15	3.61
Germany	284.11	321.98	275.21	301.73	447.97	12.06
Cameroon	517.57	398.20	298.72	320.99	389.69	-6.85
France	215.81	250.54	188.71	219.68	226.52	1.22
Italy	54.52	65.45	69.01	85.09	118.58	21.44
United Kingdom	85.05	94.04	96.91	93.50	117.90	8.51
Poland	29.18	33.05	42.12	41.68	62.93	21.18
Canada (41)	0.44	1.12	1.14	1.91	2.28	50.92

Netherlands' Top Ten Suppliers of Cocoa and Cocoa Preparations, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Côte d'Ivoire	27.58	28.12	25.65	24.15	22.73	-4.85
Ghana	14.00	18.33	17.33	14.29	14.77	0.76
Belgium	8.07	8.47	10.68	12.00	11.08	3.01
Nigeria	10.02	9.42	7.70	9.75	9.44	-0.58
Germany	7.13	7.10	8.02	7.94	9.19	2.06
Cameroon	12.98	8.79	8.71	8.44	7.99	-4.99
France	5.41	5.53	5.50	5.78	4.65	-0.77
Italy	1.37	1.44	2.01	2.24	2.43	1.06
United Kingdom	2.13	2.07	2.82	2.46	2.42	0.29
Poland	0.73	0.73	1.23	1.10	1.29	0.56
Canada (41)	0.01	0.02	0.03	0.05	0.05	0.04

Cocoa and Cocoa Preparations Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Netherlands' imports from the world	3,986.29	4,531.96	3,431.19	3,802.15	4,874.64	5.16
Netherlands' imports from Canada	0.44	1.12	1.14	1.91	2.28	50.92
Supply gap	3,985.85	4,530.84	3,430.05	3,800.24	4,872.36	5.15



**Netherlands' Top Five Cocoa and Cocoa Preparation Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
180100	Raw or roasted cocoa beans	1,793.67	1,636.49	2,033.14	6.47%
180690	Cocoa preparations, not in bulk form, not elsewhere specified	457.27	628.08	805.73	32.74%
180400	Cocoa butter, fat and oil	227.89	379.62	549.15	55.23%
180310	Cocoa paste, not defatted	240.27	318.33	428.60	33.56%
180631	Chocolate and other cocoa preparations, in bars, blocks or slabs, filled, <2kg	90.22	122.93	164.40	34.99%

**Netherlands' Top Five Cocoa and Cocoa Preparation Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
180100	Raw or roasted cocoa beans	Côte d'Ivoire 30.05	Ghana 20.01	Nigeria 19.04	N/A
180690	Cocoa preparations, not in bulk form, not elsewhere specified	Belgium 24.77	Germany 19.61	France 19.41	0.25
180400	Cocoa butter, fat and oil	Ghana 31.19	Côte d'Ivoire 30.14	Germany 8.73	N/A
180310	Cocoa paste, not defatted	Côte d'Ivoire 63.97	Ghana 23.12	Germany 6.08	N/A
180631	Chocolate and other cocoa preparations, in bars, blocks or slabs, filled, <2kg	Germany 45.42	Belgium 22.31	Poland 8.68	<0.01



## 7. BEVERAGES

*\*does not include juices*

### Netherlands' Top Ten Suppliers of Beverages, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>3,589.36</b>	<b>4,107.71</b>	<b>3,995.98</b>	<b>4,525.69</b>	<b>4,647.85</b>	<b>6.67</b>
Germany	818.67	910.14	786.81	849.82	861.81	1.29
France	878.40	892.68	783.34	733.49	859.21	-0.55
Belgium	498.82	584.02	645.86	718.89	721.51	9.67
United Kingdom	256.29	453.12	342.12	471.37	525.46	19.66
Italy	196.13	215.03	196.35	226.93	258.36	7.13
Spain	156.43	143.24	152.18	159.62	180.69	3.67
Chile	94.00	107.14	106.34	111.71	128.59	8.15
United States	80.61	93.70	173.67	104.08	113.55	8.94
Austria	71.80	91.18	88.56	102.82	107.29	10.56
Guatemala	12.51	65.47	63.33	137.52	65.65	51.35
Canada (46)	2.78	3.16	3.08	3.68	4.25	11.21

### Netherlands' Top Ten Suppliers of Beverages, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	22.81	22.16	19.69	18.78	18.54	-4.27
France	24.47	21.73	19.60	16.21	18.49	-5.98
Belgium	13.90	14.22	16.16	15.88	15.52	1.62
United Kingdom	7.14	11.03	8.56	10.42	11.31	4.17
Italy	5.46	5.23	4.91	5.01	5.56	0.10
Spain	4.36	3.49	3.81	3.53	3.89	-0.47
Chile	2.62	2.61	2.66	2.47	2.77	0.15
United States	2.25	2.28	4.35	2.30	2.44	0.19
Austria	2.00	2.22	2.22	2.27	2.31	0.31
Guatemala	0.35	1.59	1.58	3.04	1.41	1.06
Canada (46)	0.08	0.08	0.08	0.08	0.09	0.01





### Beverages Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Netherlands' imports from the world	3,589.36	4,107.71	3,995.98	4,525.69	4,647.85	6.67
Netherlands' imports from Canada	2.78	3.16	3.08	3.68	4.25	11.21
Supply gap	3,586.58	4,104.55	3,992.90	4,522.01	4,643.60	6.67

### Netherlands' Top Five Beverage Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
220421	Wine of fresh grapes (other than sparkling), ≤2 litres	977.54	1,047.74	1,151.17	8.52
220710	Undenatured ethyl alcohol, ≥80% strength by volume	557.12	687.96	508.74	-4.44
220210	Sweetened or flavoured waters, including mineral and aerated	337.58	361.44	418.18	11.30
220830	Whiskies	257.25	278.07	360.71	18.41
220300	Beer made from malt	273.47	300.83	352.18	13.48

### Netherlands' Top Five Beverage Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
220421	Wine of fresh grapes (other than sparkling), ≤2 litres	France 30.71	Germany 11.51	Italy 11.00	<0.01
220710	Undenatured ethyl alcohol, ≥80% strength by volume	France 24.45	United Kingdom 17.22	Guatemala 12.46	N/A
220210	Sweetened or flavoured waters, including mineral and aerated	Germany 39.96	Belgium 26.54	Austria 18.62	N/A
220830	Whiskies	United Kingdom 39.40	Germany 15.10	United States 13.09	0.54
220300	Beer made from malt	Belgium 45.15	Germany 25.42	United Kingdom 8.04	0.02



## 8. PREPARED VEGETABLES, FRUIT AND NUTS

Netherlands' Top Ten Suppliers of Prepared Vegetables, Fruit and Nuts, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>2,979.05</b>	<b>3,331.62</b>	<b>3,270.71</b>	<b>3,581.75</b>	<b>3,896.33</b>	<b>6.94</b>
Brazil	433.08	491.27	627.50	614.07	716.73	13.42
Germany	431.40	478.46	451.27	518.09	553.56	6.43
Belgium	448.90	531.09	488.57	527.76	548.17	5.12
Turkey	100.12	96.61	155.07	192.00	213.37	20.82
United States	113.13	124.64	100.69	136.91	171.89	11.02
Italy	103.93	131.69	124.69	140.70	162.63	11.84
Spain	113.28	123.57	112.47	126.95	129.95	3.49
Poland	80.05	130.20	101.10	120.28	127.36	12.31
Thailand	111.59	128.66	82.45	87.38	98.90	-2.97
Ecuador	71.26	63.99	57.41	60.91	92.23	6.66
Canada (28)	10.85	12.28	10.69	14.67	20.06	16.60

Netherlands' Top Ten Suppliers of Prepared Vegetables, Fruit and Nuts, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Brazil	14.54	14.75	19.19	17.14	18.40	3.86
Germany	14.48	14.36	13.80	14.46	14.21	-0.27
Belgium	15.07	15.94	14.94	14.73	14.07	-1.00
Turkey	3.36	2.90	4.74	5.36	5.48	2.12
United States	3.80	3.74	3.08	3.82	4.41	0.61
Italy	3.49	3.95	3.81	3.93	4.17	0.68
Spain	3.80	3.71	3.44	3.54	3.34	-0.46
Poland	2.69	3.91	3.09	3.36	3.27	0.58
Thailand	3.75	3.86	2.52	2.44	2.54	-1.21
Ecuador	2.39	1.92	1.76	1.70	2.37	-0.02
Canada (28)	0.36	0.37	0.33	0.41	0.51	0.15



### Prepared Vegetables, Fruit and Nuts Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Netherlands' imports from the world	2,979.05	3,331.62	3,270.71	3,581.75	3,896.33	6.94
Netherlands' imports from Canada	10.85	12.28	10.69	14.67	20.06	16.60
Supply gap	2,968.19	3,319.34	3,260.01	3,567.08	3,876.27	6.90

### Netherlands' Top Five Prepared Vegetable, Fruit and Nut Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
200919	Orange juice (other than frozen), whether or not sweetened	565.38	510.28	623.74	5.03
200989	Juice of any single fruit or vegetable, not fortified, not elsewhere specified	194.97	219.68	288.35	21.61
200410	Frozen, prepare/preserved potatoes (including French fries)	281.19	291.87	279.77	-0.25
200912	Orange juice, (other than frozen) of a Brix value $\leq 20$	196.05	232.51	247.33	12.32
200899	Prepared/preserved fruit and edible plant parts, not elsewhere specified	160.27	188.29	222.90	17.93

### Netherlands' Top Five Prepared Vegetable, Fruit and Nut Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
200919	Orange juice (other than frozen), whether or not sweetened	Brazil 83.33	Belgium 4.30	South Africa 3.08	N/A
200989	Juice of any single fruit or vegetable, not fortified, not elsewhere specified	Ecuador 24.07	Poland 15.32	Peru 12.92	0.36
200410	Frozen, prepare/preserved potatoes (including French fries)	Belgium 73.70	Germany 13.43	France 8.54	N/A
200912	Orange juice, (other than frozen) of a Brix value $\leq 20$	Brazil 60.66	Germany 25.10	Belgium 4.61	N/A
200899	Prepared/preserved fruit and edible plant parts, not elsewhere specified	India 21.55	Costa Rica 10.30	Ecuador 8.83	1.45



## 9. CEREALS

### Netherlands' Top Ten Suppliers of Cereals, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>2,618.60</b>	<b>3,332.30</b>	<b>3,337.14</b>	<b>3,854.98</b>	<b>3,697.95</b>	<b>9.01</b>
France	1,099.36	1,045.90	1,116.30	1,370.23	1,102.96	0.08
Germany	651.07	781.00	807.76	815.26	703.66	1.96
Ukraine	2.90	145.12	176.08	278.18	414.37	245.69
Belgium	191.09	230.84	251.97	240.43	219.18	3.49
Romania	1.05	38.81	71.07	93.45	145.86	243.53
Russia	1.33	27.69	39.63	9.29	138.79	219.74
Canada	7.72	4.51	23.56	1.92	101.86	90.58
Brazil	67.63	115.83	3.56	244.02	93.45	8.42
United Kingdom	169.48	278.63	130.57	117.91	86.66	-15.44
India	36.58	36.19	49.87	57.00	70.10	17.65

### Netherlands' Top Ten Suppliers of Cereals, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
France	41.98	31.39	33.45	35.54	29.83	-12.15
Germany	24.86	23.44	24.21	21.15	19.03	-5.83
Ukraine	0.11	4.35	5.28	7.22	11.21	11.10
Belgium	7.30	6.93	7.55	6.24	5.93	-1.37
Romania	0.04	1.16	2.13	2.42	3.94	3.90
Russia	0.05	0.83	1.19	0.24	3.75	3.70
Canada	0.29	0.14	0.71	0.05	2.75	2.46
Brazil	2.58	3.48	0.11	6.33	2.53	-0.05
United Kingdom	6.47	8.36	3.91	3.06	2.34	-4.13
India	1.40	1.09	1.49	1.48	1.90	0.50

### Cereals Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Netherlands' imports from the world	2,618.60	3,332.30	3,337.14	3,854.98	3,697.95	9.01
Netherlands' imports from Canada	36.58	36.19	49.87	57.00	70.10	17.65
Supply gap	2,610.88	3,327.79	3,313.58	3,853.06	3,596.10	8.33



**Netherlands' Top Five Cereal Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
100590	Corn (maize), other than seed	1,151.31	1,263.08	1,267.63	4.93
100199	Non-durum wheat and meslin, other than seed	605.72	700.67	919.84	23.23
100390	Barley, other than seed	430.71	500.82	425.75	-0.58
100510	Certified corn (maize) seed, excluding sweet corn	74.65	135.78	179.40	55.02
100620	Husked brown rice	81.70	84.18	104.10	12.88

**Netherlands' Top Five Cereal Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
100590	Corn (maize), other than seed	Ukraine 31.14	France 19.84	Russia 8.64	6.02
100199	Non-durum wheat and meslin, other than seed	France 48.65	Germany 32.41	Belgium 6.24	0.45
100390	Barley, other than seed	France 48.13	Germany 24.57	United Kingdom 9.58	N/A
100510	Certified corn (maize) seed, excluding sweet corn	Chile 32.77	France 23.10	New Zealand 16.03	2.15
100620	Husked brown rice	India 61.30	Pakistan 11.23	Thailand 10.43	N/A



## 10. FISH AND CRUSTACEANS

Netherlands' Top Ten Suppliers of Fish and Crustaceans, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>2,397.52</b>	<b>2,712.59</b>	<b>2,675.08</b>	<b>2,798.62</b>	<b>3,437.49</b>	<b>9.43</b>
Iceland	340.74	388.45	340.26	346.71	402.82	4.27
Germany	302.74	401.38	417.64	337.40	340.44	2.98
Belgium	191.08	195.80	199.97	239.54	289.68	10.96
Russia	74.39	132.93	144.04	198.98	281.57	39.48
Norway	147.11	152.58	161.01	174.78	233.92	12.29
Denmark	145.04	152.13	171.05	206.51	210.07	9.70
United Kingdom	153.81	172.93	164.69	162.66	177.17	3.60
Turkey	67.88	78.26	77.41	112.22	146.27	21.16
United States	84.95	90.37	88.14	100.61	129.21	11.05
China	115.77	137.24	119.71	113.04	116.73	0.21
Canada (33)	8.19	12.28	8.92	10.20	16.34	18.85

Netherlands' Top Ten Suppliers of Fish and Crustaceans, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Iceland	14.21	14.32	12.72	12.39	11.72	-2.49
Germany	12.63	14.80	15.61	12.06	9.90	-2.72
Belgium	7.97	7.22	7.48	8.56	8.43	0.46
Russia	3.10	4.90	5.38	7.11	8.19	5.09
Norway	6.14	5.62	6.02	6.25	6.81	0.67
Denmark	6.05	5.61	6.39	7.38	6.11	0.06
United Kingdom	6.42	6.37	6.16	5.81	5.15	-1.26
Turkey	2.83	2.89	2.89	4.01	4.26	1.42
United States	3.54	3.33	3.29	3.59	3.76	0.22
China	4.83	5.06	4.47	4.04	3.40	-1.43
Canada (33)	0.34	0.45	0.33	0.36	0.48	0.13



### Fish and Crustaceans Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Netherlands' imports from the world	2,397.52	2,712.59	2,675.08	2,798.62	3,437.49	9.43
Netherlands' imports from Canada	8.19	12.28	8.92	10.20	16.34	18.85
Supply gap	2,389.33	2,700.31	2,666.16	2,788.42	3,421.14	9.39

### Netherlands' Top Five Fish and Crustacean Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
030617	Frozen shrimp and prawns, other than cold-water	233.16	267.99	442.45	37.75
030471	Frozen cod fillets	132.28	201.21	284.97	46.77
030363	Frozen cod	99.68	116.66	180.37	34.52
030354	Frozen mackerel	116.35	87.01	121.61	2.23
030562	Salted or brined cod, not dried or smoked	106.58	98.42	112.14	2.58

### Netherlands' Top Five Fish and Crustacean Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
030617	Frozen shrimp and prawns, other than cold-water	India 23.80	Bangladesh 20.45	Belgium 16.46	N/A
030471	Frozen cod fillets	Russia 54.90	Iceland 22.75	Norway 9.99	0.27
030363	Frozen cod	Russia 48.55	Norway 35.11	United States 11.66	N/A
030354	Frozen mackerel	Germany 30.11	Faroe Islands 24.93	Lithuania 13.43	N/A
030562	Salted or brined cod, not dried or smoked	Iceland 86.89	Norway 6.50	Faroe Islands 4.92	N/A



## CONCLUSION

The Netherlands is a mature market, and the world's sixth-largest importer of agri-food and seafood products. Canada ranked as its 45<sup>th</sup>-largest supplier in 2014, having registered a small increase in import value since 2010. While the Netherlands' imports from Canada have been growing at a similar rate to their imports from the world, they remain fairly marginal compared to other partners. This has allowed for a significant supply gap between the Netherlands and Canada that has been widening at a rate identical to the Netherlands' overall import growth in recent years. While the Netherlands sources agri-food and seafood products from a large number of countries, among many commodities the vast majority of imports come from the top one or two suppliers. As well, in many cases the primary trading partners are other European Union members, leaving just marginal market share for others.

Among the Netherlands' top ten import commodities, Canada's highest supplier ranking was in cereals, where it occupied the seventh spot with 2.8% of the market, and posted the fourth-strongest growth rates of all supplier countries over the 2010-2014 period. In contrast, Canada holds less than 1.0% market share in eight of the Netherlands' top ten import commodities, and falls outside of not only the top ten, but the top twenty suppliers among eight of these commodities. Despite this, over the last five years, Dutch imports from Canada have posted growth within eight of the top commodities (edible fruit and nuts; food waste and animal feed; cocoa and cocoa preparations; beverages; prepared vegetables, fruit, and nuts; cereals; and fish and crustaceans). This may present further opportunities to lessen the gap, particularly in the aforementioned categories where value growth in imports from Canada outpaced growth in imports from the world. Furthermore, Canada's performance relative to non-European Union suppliers is expected to improve as a result of CETA.

## FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in the Netherlands**  
<http://www.tradecommissioner.gc.ca/eng/office.jsp?oid=23&cid=118>
- **Find a Trade Commissioner**  
[www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp](http://www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp)

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- [ats-sea.agr.gc.ca](http://ats-sea.agr.gc.ca)

## RESOURCES

Global Trade Atlas (June 2015).

## ANNEX: ABBREVIATIONS

- CAGR** - compound annual growth rate  
**N/A** - not applicable  
**N/C** - not calculable  
**PP** - percentage point (difference between two percentage values)





## **Competitive Trade Analysis: Netherlands**

*Global Analysis Report*

Prepared by: Stephanie Clarke, Market Analyst

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