



**MARKET ACCESS SECRETARIAT  
Global Analysis Report**

# Competitive Trade Analysis

## Ireland

**June 2016**



### REPORT CONTENT SUMMARY

- This report looks to highlight the major sectors in Ireland, and attempts to identify the best opportunities for Canadian exports.
- Specifically, the data analysis that follows focuses on the top ten Irish imports by major aggregate sector, of which Canada is a supplier. It identifies the gap between Ireland's 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 the Central Statistics office of Ireland, and were sourced from Global Trade Atlas (2015).

### IRISH MARKET SUMMARY

- In 2014, Ireland was the eighth-largest importer of agri-food and seafood products in the world, and the fifth-largest among members of the European Union (EU) in 2014. Ireland is also the world's tenth-largest agri-food and seafood exporter (sixth-largest in the EU) with C\$51.2 billion in exports. However, the C\$10.9 billion trade deficit in 2014, highlights the country dependency for agrifood and seafood imports
- Ireland's top agri-food and seafood trading partners include the United Kingdom with 39.4% of total import value, the Netherlands (9.9%), and Northern Ireland (7.6%). Canada had a 13<sup>th</sup> place ranking in 2014 with a 1.2% share of Irish imports, or C\$132.5 million.

*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

Ireland sources a diverse range of agri-food and seafood products from over 185 countries. Key import commodities include beverage (10.3% of total imports), food waste and animal feed (10.1%) and dairy, eggs and honey (9.8%). The top three supplying countries of overall agri-food and seafood imports are, the United Kingdom, the Netherlands and Northern Ireland. Canada is ranked thirteenth among supplying countries to Ireland, and registered a compound annual growth rate (CAGR) of 36.9% from 2010 to 2014.

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

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>7,983.72</b>	<b>8,860.63</b>	<b>9,132.87</b>	<b>10,274.19</b>	<b>11,141.89</b>	<b>8.69</b>
1 United Kingdom	3,202.09	3,489.89	3,585.31	3,936.94	4,383.82	8.17
2 Netherlands	757.97	901.35	886.35	1,000.68	1,098.69	9.72
3 Northern Ireland	654.67	731.51	653.99	706.69	843.34	6.54
4 Germany	497.16	560.73	620.26	770.83	778.49	11.86
5 France	508.38	517.36	534.89	644.49	613.79	4.82
6 United States	349.43	360.55	294.13	484.86	445.14	6.24
7 Argentina	130.60	219.80	297.35	292.10	306.05	23.73
8 Spain	186.47	178.18	213.16	266.14	255.82	8.23
9 Belgium	209.35	233.72	212.19	211.22	232.65	2.67
10 Italy	147.67	168.00	172.46	213.78	217.48	10.16
13 Canada	37.76	73.94	49.11	79.71	132.51	36.87

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

Country	2010	2011	2012	2013	2014	PP Change 2010-14
1 United Kingdom	40.11	39.39	39.26	38.32	39.35	-0.76
2 Netherlands	9.49	10.17	9.71	9.74	9.86	0.37
3 Northern Ireland	8.20	8.26	7.16	6.88	7.57	-0.63
4 Germany	6.23	6.33	6.79	7.50	6.99	0.76
5 France	6.37	5.84	5.86	6.27	5.51	-0.86
6 United States	4.38	4.07	3.22	4.72	4.00	-0.38
7 Argentina	1.64	2.48	3.26	2.84	2.75	1.11
8 Spain	2.34	2.01	2.33	2.59	2.30	-0.04
9 Belgium	2.62	2.64	2.32	2.06	2.09	-0.53
10 Italy	1.85	1.90	1.89	2.08	1.95	0.10
13 Canada	0.47	0.83	0.54	0.78	1.19	0.72

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

	2010	2011	2012	2013	2014	CAGR % 2010-14
Ireland's imports from the world	7,983.72	8,860.63	9,132.87	10,274.19	11,141.89	8.69
Ireland's imports from Canada	37.76	73.94	49.11	79.71	132.51	36.87
Supply gap	7,945.96	8,786.68	9,083.76	10,194.48	11,009.38	8.49



Beverages represented Ireland's top-grossing import commodity in 2014, with a value of over C\$11.0 billion, or 10.3% of overall agri-food and seafood imports. The categories of dairy, eggs, and honey, and sugar and sugar confectionarys were the strongest growing commodities over the period, with CAGRs of 19.3% and 13.1%.

**Ireland's 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>7,983.72</b>	<b>8,860.63</b>	<b>9,132.87</b>	<b>10,274.19</b>	<b>11,141.89</b>	<b>8.69</b>
1	22	Beverages	1,025.79	1,045.27	1,040.76	1,052.47	1,151.02	2.92
2	23	Animal feed	720.42	853.69	1,025.36	1,216.49	1,132.18	11.96
3	04	Dairy, eggs and honey	540.63	609.42	678.31	856.81	1,095.55	19.31
4	19	Prepared cereal, flour starch or milk	782.27	886.12	875.91	940.05	1,061.65	7.93
5	02	Meat and edible offal	569.70	612.21	632.87	731.03	844.24	10.33
6	20	Prepared vegetables, fruits and nuts	445.87	498.87	481.76	522.73	595.14	7.49
7	16	Edible meat, fish and crustaceans	414.29	489.67	512.07	514.82	580.11	8.78
8	21	Miscellaneous edible preparations	491.52	478.38	396.65	464.24	539.29	2.35
9	08	Edible fruits and nuts	372.73	391.87	388.17	457.20	516.89	8.52
10	17	Sugar and sugar confectionary	314.93	363.24	399.58	504.42	514.63	13.06



## TOP TEN AGRI-FOOD AND SEAFOOD COMMODITY IMPORTS

### 1. BEVERAGES

*\*does not include juices*

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

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>1,025.79</b>	<b>1,045.27</b>	<b>1,040.76</b>	<b>1,052.47</b>	<b>1,151.02</b>	<b>2.92</b>
United Kingdom	167.01	205.31	309.54	350.98	424.62	26.27
France	116.51	118.05	122.71	123.26	118.27	0.37
Netherlands	83.94	90.46	63.85	68.82	75.17	-2.72
Germany	44.34	45.52	46.15	55.38	73.87	13.61
Ireland	90.03	90.14	79.67	72.88	69.38	-6.31
Chile	51.67	51.08	52.38	54.52	63.55	5.31
Northern Ireland	209.87	198.21	108.10	53.65	51.94	-29.47
Italy	37.75	42.78	46.95	52.95	51.70	8.18
Australia	55.44	52.43	54.32	39.58	40.59	-7.50
Spain	26.43	24.88	27.64	39.54	27.10	0.63
(38) Canada	0.84	0.35	0.31	0.28	0.19	-31.31

#### Ireland's Top Ten Suppliers of Beverages, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
France	16.28	19.64	29.74	33.35	36.89	20.61
Italy	11.36	11.29	11.79	11.71	10.28	-1.08
Netherlands	8.18	8.65	6.13	6.54	6.53	-1.65
Germany	4.32	4.36	4.43	5.26	6.42	2.09
Spain	8.78	8.62	7.66	6.92	6.03	-2.75
United States	5.04	4.89	5.03	5.18	5.52	0.48
Ireland	20.46	18.96	10.39	5.10	4.51	-15.95
Belgium	3.68	4.09	4.51	5.03	4.49	0.81
Australia	5.40	5.02	5.22	3.76	3.53	-1.88
New Zealand	2.58	2.38	2.66	3.76	2.35	-0.22
(38) Canada	0.08	0.03	0.03	0.03	0.02	-0.07



### Beverages Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Ireland's imports from the world	1,025.79	1,045.27	1,040.76	1,052.47	1,151.02	2.92
Ireland's imports from Canada	0.84	0.35	0.31	0.28	0.19	-31.31
Supply gap	1,024.95	1,044.92	1,040.44	1,052.18	1,150.83	34.23

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

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
220421	Grape wine, < 2 liters	286.30	298.48	294.97	1.50
220210	Mineral water	234.14	252.17	287.61	10.83
220300	Beer made from malt	179.57	185.37	208.53	7.76
220290	Non alcoholic beverages	34.74	45.83	56.19	27.18
220870	Liqueurs and cordials	67.26	46.75	50.41	-13.43

### Ireland's Top Beverage Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
220421	Grape wine, < 2L	Chile 21.28	France 16.83	Australia 12.04	N/A
220210	Mineral water	United Kingdom 74.95	Switzerland 8.46	Germany 6.48	N/C
220300	Beer made from malt	Ireland 30.41	United Kingdom 27.19	Netherlands 15.29	0.05
220290	Non alcoholic beverages	United Kingdom 41.85	Netherlands 25.14	United States 8.91	N/A
220870	Liqueurs and cordials	Northern Ireland 67.42	United Kingdom 13.58	Germany 9.90	N/C



## 2. FOOD WASTE AND ANIMAL FEED

### Ireland's Top Ten Suppliers of Food Waste and Animal Feed, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>720.42</b>	<b>853.69</b>	<b>1,025.36</b>	<b>1,216.49</b>	<b>1,132.18</b>	<b>11.96</b>
Argentina	110.68	142.19	224.46	219.73	276.11	25.67
United Kingdom	132.07	175.75	186.45	195.11	211.08	12.44
United States	175.43	178.27	127.90	283.80	196.31	2.85
Northern Ireland	56.12	78.96	112.38	144.74	126.67	22.57
Netherlands	32.26	90.30	75.60	70.38	56.01	14.79
France	47.49	45.45	55.77	69.95	55.63	4.04
Germany	22.82	19.45	31.03	40.04	33.80	10.33
Indonesia	7.70	9.05	26.18	18.82	32.37	43.19
Canada	23.07	32.60	31.31	30.39	30.08	6.87
Poland	14.58	6.69	22.31	29.78	26.60	16.22

### Ireland's Top Ten Suppliers of Food Waste and Animal Feed, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Argentina	15.36	16.66	21.89	18.06	24.39	9.02
United Kingdom	18.33	20.59	18.18	16.04	18.64	0.31
United States	24.35	20.88	12.47	23.33	17.34	-7.01
Northern Ireland	7.79	9.25	10.96	11.90	11.19	3.40
Netherlands	4.48	10.58	7.37	5.79	4.95	0.47
France	6.59	5.32	5.44	5.75	4.91	-1.68
Germany	3.17	2.28	3.03	3.29	2.99	-0.18
Indonesia	1.07	1.06	2.55	1.55	2.86	1.79
Canada	3.20	3.82	3.05	2.50	2.66	-0.54
Poland	2.02	0.78	2.18	2.45	2.35	0.33

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

	2010	2011	2012	2013	2014	CAGR % 2010-14
Ireland's imports from the world	720.42	853.69	1,025.36	1,216.49	1,132.18	11.96
Ireland's imports from Canada	23.07	32.60	31.31	30.39	30.08	6.87
Supply gap	705.85	847.00	1,003.05	1,186.71	1,105.58	-4.26



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

HS Code	Product Description	2012	2013	2014	CAGR 2012-14
230990	Animal feed, except cat and dog food	215.64	294.30	296.44	17.25
230400	Soymeal	190.68	234.37	254.55	15.54
230910	Dog and cat food, for retail	108.45	115.42	124.02	6.94
230330	Brewing or distilling dregs	78.22	114.65	120.03	23.87
230800	Vegetable materials, waste	151.61	157.12	108.61	-15.36

**Ireland's 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	
230990	Animal feed, except cat and dog food	United Kingdom 36.68	United States 30.70	Northern Ireland 23.40	0.01
230400	Soymeal	Argentina 80.48	Canada 7.69	Northern Ireland 5.78	7.69
230910	Dog and cat food, for retail	United Kingdom 55.13	France 13.34	Germany 9.40	0.09
230330	Brewing or distilling dregs	United States 62.53	Canada 8.64	Northern Ireland 5.87	8.64
230800	Vegetable materials, waste	Argentina 65.59	United States 15.39	Northern Ireland 5.26	N/A



### 3. DAIRY, EGGS AND HONEY

Ireland's Top Ten Suppliers of Dairy, Eggs and Honey, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>540.63</b>	<b>609.42</b>	<b>678.31</b>	<b>856.81</b>	<b>1,095.55</b>	<b>19.31</b>
United Kingdom	219.47	246.48	284.80	351.40	426.71	18.08
Northern Ireland	135.09	175.70	159.86	208.74	323.96	24.44
Germany	48.06	53.27	65.57	89.90	77.58	12.72
France	33.69	36.67	34.86	56.41	66.75	18.64
Netherlands	25.75	25.75	23.50	43.76	54.13	20.41
Denmark	3.76	3.74	23.22	18.86	48.11	89.18
Italy	11.66	13.01	13.39	15.36	18.07	11.57
Ireland	22.29	6.83	17.15	17.72	17.99	-5.22
Belgium	19.82	22.80	19.87	18.27	13.72	-8.78
Poland	4.27	5.35	6.20	8.26	10.49	25.20
(34) Canada	0.00	0.03	0.01	0.01	0.13	401.98

Ireland's Top Ten Suppliers of Dairy, Eggs and Honey, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
United Kingdom	14.54	15.61	15.88	16.27	15.79	-1.25
Northern Ireland	9.92	8.83	9.09	10.33	9.60	0.31
Germany	7.04	7.50	7.38	7.40	6.60	0.44
France	2.49	2.66	3.21	3.76	5.10	-2.61
Netherlands	5.21	5.49	5.20	4.97	4.96	0.25
Denmark	4.60	4.18	4.17	3.99	4.56	0.04
Italy	5.44	4.88	4.63	4.36	4.44	1.00
Ireland	5.57	5.13	3.69	3.85	4.30	1.26
Belgium	4.54	4.82	4.60	4.17	3.82	0.73
Poland	4.27	3.84	3.67	3.42	3.65	0.61
(34) Canada	0.29	0.24	0.21	0.17	0.17	0.11

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

	2010	2011	2012	2013	2014	CAGR 2010-14
Ireland's imports from the world	540.63	609.42	678.31	856.81	1,095.55	19.31
Ireland's imports from Canada	0.00	0.03	0.01	0.01	0.13	401.98
Supply gap	540.63	609.39	678.30	856.80	1,095.41	-382.67





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

HS Code	Product Description	2012	2013	2014	CAGR 2012-14
040120	Milk and cream, fat content >1%, <6%	136.17	180.35	298.48	48.05
040690	Specialty cheese	127.24	158.34	167.97	14.90
040210	Milk and cream, grain or solids, fat content <1.5%	34.87	61.26	119.90	85.42
040310	Yogurt	91.44	99.74	113.77	11.54
040610	Fresh cheese and cheese curd	64.99	100.21	95.14	21.00

**Ireland's 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	
040120	Milk and cream, fat content >1%, <6%	Northern Ireland 89.51	United Kingdom 10.00	Poland 0.34	N/A
040690	Specialty cheese	United Kingdom 61.70	Germany 9.10	Italy 7.01	0.08
040210	Milk and cream, grain or solids, fat content <1.5%	United Kingdom 38.04	Denmark 32.04	Northern Ireland 10.36	N/A
040310	Yogurt	United Kingdom 61.63	France 18.60	Germany 7.83	N/A
040610	Fresh cheese and cheese curd	United Kingdom 57.35	Germany 17.41	France 12.80	N/A



#### 4. BAKING RELATED GOODS AND PASTA

Ireland's Top Ten Suppliers of Baking Related Goods and Pasta, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR 2010-14
<b>World</b>	<b>782.27</b>	<b>886.12</b>	<b>875.91</b>	<b>940.05</b>	<b>1,061.65</b>	<b>7.93</b>
United Kingdom	573.06	609.24	620.67	658.86	713.85	5.65
Germany	48.77	68.29	69.22	74.80	85.93	15.21
Netherlands	42.37	44.05	40.72	52.50	58.51	8.40
Italy	16.93	23.88	24.58	28.79	32.39	17.62
Northern Ireland	24.03	21.35	21.35	26.06	32.13	7.53
France	23.16	28.60	25.86	26.95	31.46	7.95
Belgium	22.41	36.92	21.24	19.32	25.76	3.55
Poland	5.55	5.75	8.20	9.83	24.91	45.56
Spain	2.48	4.43	9.48	14.57	20.44	69.53
Singapore	3.32	3.62	3.67	4.03	4.21	6.15
(27) Canada	0.44	0.71	0.58	0.54	0.62	9.03

Ireland's Top Ten Suppliers of Baking Related Good and Pasta, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
United Kingdom	73.26	68.75	70.86	70.09	67.24	-6.02
Germany	6.23	7.71	7.90	7.96	8.09	1.86
Netherlands	5.42	4.97	4.65	5.58	5.51	0.10
Italy	2.16	2.70	2.81	3.06	3.05	0.89
Northern Ireland	3.07	2.41	2.44	2.77	3.03	-0.05
France	2.96	3.23	2.95	2.87	2.96	0.00
Belgium	2.86	4.17	2.42	2.06	2.43	-0.44
Poland	0.71	0.65	0.94	1.05	2.35	1.64
Spain	0.32	0.50	1.08	1.55	1.93	1.61
Singapore	0.42	0.41	0.42	0.43	0.40	-0.03
(27) Canada	0.06	0.08	0.07	0.06	0.06	0.00

Baking related Goods and Pasta Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR 2010-14
Ireland's imports from the world	782.27	886.12	875.91	940.05	1,061.65	7.93
Ireland's imports from Canada	0.44	0.71	0.58	0.54	0.62	9.03
Supply gap	781.83	885.41	875.33	939.51	1,061.03	7.93



**Ireland's Top Five Baking Related Goods and Pasta Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR 2012-14
190590	Bread, pastry, cakes and puddings	366.00	378.25	420.09	7.14
190410	Prepared food, cereal products	142.90	153.01	168.05	8.44
190531	Cookies (sweet biscuits)	113.15	132.16	134.11	8.87
190120	Mixes and doughs of bakers wares	54.98	65.75	72.44	14.79
190190	Malt extract, flour, meal, milk products	41.70	45.77	66.24	26.03

**Ireland's Top Five Baking Related Goods and Pasta Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
190590	Bread, pastry, cakes and puddings	United Kingdom 68.62	Germany 11.00	Northern Ireland 4.00	0.01
190410	Prepared food, cereal products	United Kingdom 86.01	Germany 8.08	Netherlands 2.14	0.14
190531	Cookies (sweet biscuits)	United Kingdom 73.37	Germany 6.74	Spain 4.78	0.15
190120	Mixes and doughs of bakers wares	United Kingdom 74.42	Northern Ireland 11.37	France 5.33	N/C
190190	Malt extract, flour, meal, milk products	Netherlands 45.02	United Kingdom 27.55	Poland 18.90	N/A



## 5. MEAT AND EDIBLE OFFAL

Ireland's Top Ten Suppliers of Meat and Edible Offal, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR 2010-14
<b>World</b>	<b>569.70</b>	<b>612.21</b>	<b>632.87</b>	<b>731.03</b>	<b>844.24</b>	<b>10.33</b>
United Kingdom	209.96	217.73	232.77	285.83	333.26	12.24
Netherlands	114.74	121.13	131.96	165.85	196.87	14.45
Northern Ireland	59.17	66.01	59.76	61.71	80.37	7.96
Germany	39.84	41.47	57.34	64.07	62.86	12.07
Poland	13.45	15.54	21.83	19.08	31.71	23.91
Denmark	17.13	24.53	26.51	30.18	29.61	14.67
France	32.04	33.63	29.59	28.31	24.55	-6.44
Spain	10.80	10.57	14.96	18.69	20.89	17.92
Brazil	8.49	13.57	11.20	13.68	17.42	19.70
Italy	14.26	14.23	12.62	14.80	12.40	-3.43
(23) Canada	0.07	0.01	0.00	0.00	0.00	-100.00

Ireland's Top Ten Suppliers of Meat and Edible Offal, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
United Kingdom	36.85	35.56	36.78	39.10	39.47	2.62
Netherlands	20.14	19.78	20.85	22.69	23.32	3.18
Northern Ireland	10.39	10.78	9.44	8.44	9.52	-0.87
Germany	6.99	6.77	9.06	8.76	7.45	0.45
Poland	2.36	2.54	3.45	2.61	3.76	1.39
Denmark	3.01	4.01	4.19	4.13	3.51	0.50
France	5.62	5.49	4.68	3.87	2.91	-2.72
Spain	1.90	1.73	2.36	2.56	2.47	0.58
Brazil	1.49	2.22	1.77	1.87	2.06	0.57
Italy	2.50	2.32	1.99	2.02	1.47	-1.03
(23) Canada	0.01	0.00	0.00	0.00	0.00	-0.01

Meat and Edible Offal Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR 2010-14
Ireland's imports from the world	569.70	612.21	632.87	731.03	844.24	10.33
Ireland's imports from Canada	0.07	0.01	0.00	0.00	0.00	-100.00
Supply gap	569.62	612.20	632.87	731.03	844.24	110.33



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

HS Code	Product Description	2012	2013	2014	CAGR 2012-14
020713	Fresh chicken cuts and edible offal	137.39	173.30	215.89	25.35
020319	Fresh boneless pork	89.18	109.12	101.50	6.68
021019	Pork, salted and dried	41.54	68.55	89.02	46.39
020130	Fresh boneless beef	61.80	72.96	88.95	19.97
020714	Frozen chicken cuts and edible offal	52.53	65.66	87.27	28.89

**Ireland's 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	
020713	Fresh chicken cuts and edible offal	Netherlands 48.51	United Kingdom 27.84	Northern Ireland 6.74	N/A
020319	Fresh boneless pork	Netherlands 22.67	United Kingdom 20.97	Spain 15.87	N/A
021019	Pork, salted and dried	United Kingdom 68.30	Germany 13.33	Netherlands 9.78	N/A
020130	Fresh boneless beef	United Kingdom 65.85	Northern Ireland 27.05	Germany 2.34	N/A
020714	Frozen chicken cuts and edible offal	United Kingdom 36.09	Netherlands 34.44	Northern Ireland 11.32	N/A



## 6. PRESERVED FOODS

Ireland's Top Ten Suppliers of Preserved Foods, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR 2010-14
<b>World</b>	<b>445.87</b>	<b>498.87</b>	<b>481.76</b>	<b>522.73</b>	<b>595.14</b>	<b>7.49</b>
United Kingdom	201.51	210.78	215.85	231.53	282.89	8.85
Germany	46.51	43.74	42.45	57.58	56.65	5.05
Brazil	33.67	56.03	54.53	47.46	47.30	8.87
Belgium	27.56	34.00	32.40	39.47	43.14	11.85
Netherlands	32.69	35.69	31.36	38.81	38.45	4.14
Italy	14.73	14.35	15.56	21.13	20.73	8.92
Northern Ireland	10.85	12.65	10.04	11.68	19.64	16.00
France	15.30	15.78	14.92	16.27	15.99	1.10
Spain	5.75	6.03	5.65	6.12	9.19	12.44
Poland	4.33	5.18	4.58	6.42	8.29	17.68
(22) Canada	1.28	1.14	0.82	1.49	1.31	0.70

Ireland's Top Ten Suppliers of Preserved Foods, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
United Kingdom	45.20	42.25	44.80	44.29	47.53	2.34
Germany	10.43	8.77	8.81	11.01	9.52	-0.91
Brazil	7.55	11.23	11.32	9.08	7.95	0.40
Belgium	6.18	6.82	6.73	7.55	7.25	1.07
Netherlands	7.33	7.15	6.51	7.42	6.46	-0.87
Italy	3.30	2.88	3.23	4.04	3.48	0.18
Northern Ireland	2.43	2.54	2.08	2.24	3.30	0.87
France	3.43	3.16	3.10	3.11	2.69	-0.75
Spain	1.29	1.21	1.17	1.17	1.54	0.25
Poland	0.97	1.04	0.95	1.23	1.39	0.42
(22) Canada	0.29	0.23	0.17	0.29	0.22	-0.07

Preserved Foods Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR 2010-14
Ireland's imports from the world	445.87	498.87	481.76	522.73	595.14	7.49
Ireland's imports from Canada	1.28	1.14	0.82	1.49	1.31	0.70
Supply gap	444.59	497.73	480.94	521.24	593.83	6.79



**Ireland's Top Five Preserved Food Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR 2012-14
200410	Frozen French fries	60.80	76.69	86.86	19.52
200520	Prepared potatoes, no vinegar, not frozen	72.97	68.60	77.34	2.95
200919	Orange juice, not frozen	60.50	56.14	66.20	4.60
200990	Mixtures of fruit and vegetable juices	30.75	42.41	34.37	5.72
200911	Frozen orange juice	33.54	29.33	27.02	-10.25

**Ireland's Top Five Preserved Food Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
200410	Frozen French fries	Belgium 38.97	United Kingdom 33.20	Netherlands 24.21	N/A
200520	Prepared potatoes, no vinegar, not frozen	United Kingdom 87.81	Netherlands 3.80	Germany 3.44	N/A
200919	Orange juice, not frozen	Brazil 67.73	United Kingdom 23.17	Netherlands 6.20	N/C
200990	Mixtures of fruit and vegetable juices	United Kingdom 65.37	Germany 16.13	United States 3.82	N/C
200911	Frozen orange juice	United Kingdom 68.38	Brazil 7.67	United States 4.30	N/C



## 7. PREPARED MEAT AND FISH

**Ireland's Top Ten Suppliers of Edible Meat and Fish, C\$ Millions**

Country	2010	2011	2012	2013	2014	CAGR 2010-14
<b>World</b>	<b>414.29</b>	<b>489.67</b>	<b>512.07</b>	<b>514.82</b>	<b>580.11</b>	<b>8.78</b>
United Kingdom	221.63	275.20	269.29	236.78	268.42	4.90
Germany	63.06	63.91	66.25	74.25	82.13	6.83
Netherlands	13.92	21.19	33.64	40.78	53.87	40.26
Poland	6.50	7.91	11.12	19.82	27.25	43.09
Thailand	28.68	33.39	28.36	27.87	25.21	-3.17
Northern Ireland	14.13	17.95	27.51	27.25	23.67	13.77
Spain	2.23	4.31	9.33	10.71	14.46	59.64
France	5.12	4.38	4.34	5.55	9.90	17.90
Denmark	7.79	6.40	11.32	10.77	9.37	4.72
Belgium	8.93	7.89	6.86	8.56	9.29	1.00
(18) Canada	1.41	1.39	1.39	1.69	1.67	4.35

**Ireland's Top Ten Suppliers of Edible Meat and Fish, % Share**

Country	2010	2011	2012	2013	2014	PP Change 2010-14
United Kingdom	53.50	56.20	52.59	45.99	46.27	-7.23
Germany	15.22	13.05	12.94	14.42	14.16	-1.06
Netherlands	3.36	4.33	6.57	7.92	9.29	5.93
Poland	1.57	1.61	2.17	3.85	4.70	3.13
Thailand	6.92	6.82	5.54	5.41	4.35	-2.58
Northern Ireland	3.41	3.66	5.37	5.29	4.08	0.67
Spain	0.54	0.88	1.82	2.08	2.49	1.96
France	1.24	0.90	0.85	1.08	1.71	0.47
Denmark	1.88	1.31	2.21	2.09	1.62	-0.27
Belgium	2.15	1.61	1.34	1.66	1.60	-0.55
(18) Canada	0.34	0.28	0.27	0.33	0.29	-0.05

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

	2010	2011	2012	2013	2014	CAGR % 2010-14
Ireland's imports from the world	414.29	489.67	512.07	514.82	580.11	8.78
Ireland's imports from Canada	1.41	1.39	1.39	1.69	1.67	4.35
Supply gap	412.88	488.27	510.68	513.12	578.44	4.44





**Ireland's Top Five Edible Meat and Fish Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
160232	Prepared or preserved chicken meat or offal	130.84	141.34	152.70	8.03
160249	Prepared pork and offal	65.12	74.24	84.32	13.79
160100	Sausages	40.80	57.53	66.53	27.69
160414	Tunas, skipjack and prepared bonito	31.51	38.36	38.52	10.57
160290	Animal meat, blood of any animal, prepared	22.54	27.35	27.90	11.25

**Ireland's Top Five Edible Meat and Fish Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
160232	Prepared or preserved chicken meat or offal	United Kingdom 39.17	Thailand 13.87	Germany 8.02	N/A
160249	Prepared pork and offal	United Kingdom 34.66	Germany 30.44	Netherlands 21.57	N/A
160100	Sausages	United Kingdom 36.69	Germany 27.92	Poland 10.52	N/A
160414	Tunas, skipjack and prepared bonito	United Kingdom 50.23	Maldives 22.20	Thailand 6.65	N/A
160290	Animal meat, blood of any animal, prepared	United Kingdom 27.91	Spain 27.58	Netherlands 23.88	N/A



## 8. MISCELLANEOUS EDIBLE PREPARATIONS

Ireland's Top Ten Suppliers of Miscellaneous Edible Preparations, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>491.52</b>	<b>478.38</b>	<b>396.65</b>	<b>464.24</b>	<b>539.29</b>	<b>2.35</b>
United Kingdom	281.76	260.66	220.57	259.13	291.11	0.82
Germany	29.89	28.37	23.90	28.98	34.87	3.93
Netherlands	26.05	34.44	27.11	32.26	32.44	5.64
Sri Lanka	9.10	11.69	8.56	13.98	17.88	18.39
France	24.54	19.84	17.53	18.59	17.05	-8.70
United States	10.65	12.01	16.97	17.77	16.66	11.83
Italy	7.38	10.40	10.05	12.66	16.64	22.55
Malaysia	0.28	0.19	0.23	0.59	14.38	167.23
Belgium	9.92	9.79	7.61	11.41	10.59	1.63
India	10.04	10.72	8.36	9.64	9.84	-0.52
(17) Canada	1.29	1.83	1.73	2.00	3.42	27.60

Ireland's Top Ten Suppliers of Miscellaneous Edible Preparations, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
United Kingdom	57.32	54.49	55.61	55.82	53.98	-3.34
Germany	6.08	5.93	6.02	6.24	6.47	0.39
Netherlands	5.30	7.20	6.83	6.95	6.02	0.72
Sri Lanka	1.85	2.44	2.16	3.01	3.32	1.46
France	4.99	4.15	4.42	4.01	3.16	-1.83
United States	2.17	2.51	4.28	3.83	3.09	0.92
Italy	1.50	2.17	2.53	2.73	3.09	1.58
Malaysia	0.06	0.04	0.06	0.13	2.67	2.61
Belgium	2.02	2.05	1.92	2.46	1.96	-0.06
India	2.04	2.24	2.11	2.08	1.82	-0.22
(17) Canada	0.26	0.38	0.44	0.43	0.63	0.37

Miscellaneous Edible Preparations Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Ireland's imports from the world	491.52	478.38	396.65	464.24	539.29	2.35
Ireland's imports from Canada	1.29	1.83	1.73	2.00	3.42	27.60
Supply gap	490.23	476.55	394.92	462.24	535.87	-25.25



**Ireland's Top Five Miscellaneous Edible Preparations Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
210690	Food preparations	103.85	127.71	161.08	24.54
210390	Sauces and related preparations, mixed condiments and mixed seasonings	93.90	109.70	128.25	16.86
210500	Ice cream and other edible ice, whether or not containing cocoa	32.69	42.57	43.20	14.96
210120	Tea or mate extracts, essences and concentrates	30.49	36.32	41.81	17.11
210111	Coffee extracts and essences	33.70	33.56	37.45	5.43

**Ireland's Top Five Miscellaneous Edible Preparations Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
210690	Food preparations	United Kingdom 44.09	Malaysia 8.36	United States 7.12	0.10
210390	Sauces and related preparations, mixed condiments and mixed seasonings	United Kingdom 62.99	Netherlands 8.47	Germany 8.10	0.03
210500	Ice cream and other edible ice, whether or not containing cocoa	United Kingdom 55.64	Germany 17.73	Belgium 10.07	N/A
210120	Tea or mate extracts, essences and concentrates	Sri Lanka 42.74	India 21.97	China 14.83	0.05
210111	Coffee extracts and essences	United Kingdom 82.76	Netherlands 3.86	Germany 3.22	N/A



## 9. EDIBLE FRUITS AND NUTS

### Ireland's Top Ten Suppliers of Edible Fruit and Nuts, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>372.73</b>	<b>391.87</b>	<b>388.17</b>	<b>457.20</b>	<b>516.89</b>	<b>8.52</b>
Netherlands	35.26	34.84	33.16	48.17	61.16	14.76
Germany	26.82	28.68	40.82	53.07	60.83	22.72
Spain	43.36	39.41	44.29	53.13	60.61	8.73
United Kingdom	58.54	67.98	61.45	69.72	56.61	-0.84
France	31.08	32.86	31.50	32.81	35.07	3.06
Costa Rica	24.08	30.50	18.34	24.16	31.71	7.12
South Africa	22.32	16.64	19.34	23.56	20.92	-1.60
Belize	11.46	12.68	14.75	17.17	17.39	11.00
Peru	6.18	8.76	11.60	13.64	16.57	27.95
Chile	11.31	11.60	9.29	11.19	14.91	7.14
(33) Canada	0.84	1.75	1.30	1.11	0.84	-0.08

### Ireland's Top Ten Suppliers of Edible Fruit and Nuts, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Netherlands	9.46	8.89	8.54	10.53	11.83	2.37
Germany	7.20	7.32	10.52	11.61	11.77	4.57
Spain	11.63	10.06	11.41	11.62	11.73	0.09
United Kingdom	15.71	17.35	15.83	15.25	10.95	-4.75
France	8.34	8.39	8.12	7.18	6.78	-1.55
Costa Rica	6.46	7.78	4.72	5.28	6.13	-0.33
South Africa	5.99	4.25	4.98	5.15	4.05	-1.94
Belize	3.07	3.23	3.80	3.76	3.36	0.29
Peru	1.66	2.23	2.99	2.98	3.21	1.55
Chile	3.04	2.96	2.39	2.45	2.88	-0.15
(33) Canada	0.23	0.45	0.33	0.24	0.16	-0.06

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

	2010	2011	2012	2013	2014	CAGR % 2010-14
Ireland's imports from the world	372.73	391.87	388.17	457.20	516.89	8.52
Ireland's imports from Canada	0.84	1.75	1.30	1.11	0.84	-0.08
Supply gap	371.89	390.12	386.87	456.10	516.05	8.60



**Ireland's Top Five Edible Fruit and Nut Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
080810	Apples, fresh	74.03	85.15	86.37	8.02
080390	Bananas, fresh	39.18	44.95	51.32	14.46
080610	Grapes, fresh	35.62	35.99	42.10	8.71
080520	Mandarins, fresh	27.12	28.02	33.63	11.37
080510	Oranges, fresh	23.27	28.18	28.87	11.38

**Ireland's 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	
080810	Apples, fresh	France 34.41	Germany 16.33	Chile 9.39	N/A
080390	Bananas, fresh	Costa Rica 44.23	Belize 33.87	Dominican Republic 5.34	N/A
080610	Grapes, fresh	United Kingdom 15.96	Germany 14.51	Netherlands 11.69	N/A
080520	Mandarins, fresh	Peru 28.55	Spain 24.36	Morocco 15.28	N/A
080510	Oranges, fresh	Spain 31.91	Egypt 15.85	South Africa 15.09	N/A



## 10. SUGAR AND SUGAR CONFECTIONARY

Ireland's Top Ten Suppliers of Sugar and Sugar Confectionary, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>314.93</b>	<b>363.24</b>	<b>399.58</b>	<b>504.42</b>	<b>514.63</b>	<b>13.06</b>
United Kingdom	161.87	178.23	186.22	209.84	209.00	6.60
Netherlands	25.74	34.26	41.33	68.55	86.39	35.35
France	27.59	34.79	30.94	49.61	55.03	18.84
Germany	27.31	28.15	39.68	75.84	41.78	11.22
Finland	0.03	6.36	14.24	0.00	10.92	326.63
Denmark	0.96	8.80	18.46	4.62	10.50	81.86
Luxembourg	7.70	7.98	8.24	11.36	10.26	7.44
Northern Ireland	6.84	5.46	6.29	8.18	8.55	5.73
Sweden	0.12	0.26	0.24	0.22	7.48	179.72
Italy	3.20	5.24	7.58	7.94	7.04	21.81
(28) Canada	0.63	1.96	2.40	1.27	1.36	20.99

Ireland's Top Ten Suppliers of Sugar and Sugar Confectionary, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
United Kingdom	51.40	49.07	46.61	41.60	40.61	-10.79
Netherlands	8.17	9.43	10.34	13.59	16.79	8.61
France	8.76	9.58	7.74	9.83	10.69	1.93
Germany	8.67	7.75	9.93	15.04	8.12	-0.55
Finland	0.01	1.75	3.56	0.00	2.12	2.11
Denmark	0.30	2.42	4.62	0.92	2.04	1.74
Luxembourg	2.45	2.20	2.06	2.25	1.99	-0.45
Northern Ireland	2.17	1.50	1.58	1.62	1.66	-0.51
Sweden	0.04	0.07	0.06	0.04	1.45	1.42
Italy	1.02	1.44	1.90	1.57	1.37	0.35
(28) Canada	0.20	0.54	0.60	0.25	0.26	0.06

Sugar and Sugar Confectionary Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Ireland's imports from the world	314.93	363.24	399.58	504.42	514.63	13.06
Ireland's imports from Canada	0.63	1.96	2.40	1.27	1.36	20.99
Supply gap	314.30	361.28	397.17	503.16	513.27	-7.92



**Ireland's Top Five Sugar and Sugar Confectionary Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
170490	Sugar confection, no cocoa	112.16	139.40	146.41	14.26
170199	Cane or beet sugar chemicals, pure sucrose refined	92.92	103.38	104.56	6.08
170219	Lactose in solid form and lactose syrup	40.11	57.08	70.26	32.35
170290	Sugar, including invert sugar and syrup	30.49	39.27	52.05	30.65
170211	Lactose and lactose syrup, containing 99% more lactose	30.77	50.95	43.05	18.28

**Ireland's Top Five Sugar and Sugar Confectionary Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
170490	Sugar confection, no cocoa	United Kingdom 63.01	Germany 8.48	Netherlands 4.47	0.05
170199	Cane or beet sugar chemicals, pure sucrose refined	United Kingdom 52.67	Finland 10.18	Luxembourg 9.69	N/A
170219	Lactose in solid form and lactose syrup	Netherlands 89.93	Denmark 6.45	Germany 1.71	N/A
170290	Sugar, including invert sugar and syrup	France 62.75	United Kingdom 12.14	Australia 11.17	N/A
170211	Lactose and lactose syrup, containing 99% more lactose	Germany 42.16	Netherlands 25.66	France 15.94	N/A



## CONCLUSION

Ireland is a growing market, and the world's eighth-largest importer of agri-food and seafood products. Canada ranked as its 13<sup>th</sup>-largest supplier in 2014, having registered a fluctuation in import value since 2010. While Ireland's imports from Canada have been fluctuating, they remain relatively marginal compared to other countries, such as European Union members, or the United States. This has created a significant supply gap between Ireland and Canada that has been widening at same rate to Ireland's overall import growth in recent years. Ireland has a overall diversified agrifood and seafood suppliers, however, the six of the top ten primary trading partners are European Union members.

Although Canada's imports (less than 2.0% of market share) to Ireland remains relatively small compared to other suppliers, Canada did see a slight increase in market share in three of the top ten commodities. These commodities were dairy, eggs, and honey, miscellaneous edible preparations, and sugar and sugar confectionaries. Once the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) enters into force, this will provide Canada with preferential market access to 4.6 million (Ireland's total population) consumers in the EU. The agreement will also eliminate approximately 95% of all of the EU tariff lines on the first day the agreement comes into force, creating significant opportunities in the agricultural and fish and seafood sector.

## 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 Ireland**  
<http://www.tradecommissioner.gc.ca/eng/office.jsp?oid=110&cid=116>
- **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 (Oct 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: Ireland**

*Global Analysis Report*

Prepared by: Carlos Jaramillo, Student

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