Beef Market in the Netherlands

July 15, 2021

Manitoba

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THE NETHERLANDS

Executive summary

The Netherlands was the European Union's (EU) third-largest importer of beef in 2020, averaging $2.8 billion annually in the last five years (2016 to 2020). The country ranks 11th in the world on GDP per capita at Purchasing Power Parity, making it one of the top countries to target for Canadian high-quality and premium beef products. The forecast market growth for 2020 to 2025 is 1.8 and 1.1 per cent for chilled and frozen meats, respectively.

Of the top list of beef suppliers to the Netherlands by value, Canada was ranked as the 19th largest supplier, worth $8.2 million in 2020[1]. Although Canada has a small market share (less than 0.5 per cent), exports of Canadian beef to the Netherlands have been increasing over the last five years, reporting a growth of 33.5 per cent between 2019 and 2020. Manitoba did not export beef to the Netherlands between 2016 and 2020.

The Canada-European Union Comprehensive Economic and Trade Agreement (CETA) presents an opportunity for Canada to increase its market share as it allows for preferential tariffs. At the same time, other direct competitors are also close to ratifying a similar agreement with the EU and this will benefit their trade activity with the Netherlands. To take advantage of trade opportunities with the Netherlands and capture market share, beef processors and exporters in Canada and Manitoba would need to target their efforts to meet export requirements, particularly those related to the EU facility certification. Manitoba producers could gain market share by providing quality and traceable meats, backed up with a solid food safety record and programs in place. Manitoba companies could also benefit from the opportunity to approach smaller players in the beef market in the Netherlands to create a supply chain and consolidate a new market for their business.

Key demographics and economic indicators

Country name: the Netherlands
Chief of State: King Willem-Alexander
Head of Government: Prime Minister Mark Rutte (since 2010)
Government Type: Parliamentary constitutional monarchy
Capital: Amsterdam
Legislature: Bicameral States with two Chambers
Judiciary: Supreme Court or Hoge Raad (consists of 41 judges)
Location: the Netherlands, Aruba, Curaçao and Sint Maarten are constituent countries of the Kingdom of the Netherlands. The Netherlands is the largest of the four countries. It is located in Western Europe and partly in the Caribbean with three special municipalities: the islands of Bonaire, Saint Eustatius and Saba. The Netherlands consists of twelve provinces, bordering Germany to the east, Belgium to the south, and the North Sea to the northwest, with maritime borders in the North Sea with those countries and the United Kingdom. The country's official language is Dutch, with West Frisian as a secondary official language in the province of Friesland, and English and Papiamento as secondary official languages in the Caribbean municipalities. [2]
Economic indicators: In 2019, the Netherlands was the 17th economy in the world in terms of GDP ($907.1 billion U.S. (2019),[3] the seventh in total exports, the seventh in total imports, the 13th economy in terms of GDP per capita and the 22nd most complex economy according to the Economic Complexity Index (ECI).
Population: 17.4 million people (Jan. 1, 2020).
GDP growth: 2.6 per cent (2018) and 1.8 per cent (2019)
GDP per capita: Decreased by $57,101 (PPP, 2020)
GDP per capita rank: 11th (nominal, 2020)
Inflation: 1.2 per cent (2020 est.)

[1] Catsnet and Global Trade Tracker – May 2021
[2] Wikipedia.org
[3] World Bank

Consumption and the market

Consumer Trends

The average Dutch person eats just over 77 kilograms of meat per year. There was a slight drop in meat consumption between 2010 and 2015; however, consumption in 2018 showed a slight increase for the first time in 10 years. In general, the Dutch consume 29 per cent of their daily meat intake at breakfast, lunch and as snacks, mainly fresh and chilled and frozen[4]. About half of Dutch people call themselves flexitarians, which means they don't eat meat with their main meal at least three times a week. The proportion of vegetarians is stable, at just under five per cent of the Dutch population[5].

Beef stew is popular in the Netherlands. Hachee is a traditional Dutch stew consisting of beef, butter, onions, stock and vinegar, which is typically seasoned with bay leaves, cloves, juniper berries, salt and pepper. Another example of beef stew is Zoervleis, an authentic delicacy originating from the province of Limburg.[6] Aside from stews, another popular Dutch delicacy is bitterballen, a popular snack that is a round-shaped version of kroket made with beef or veal.

In 2018, the Government of the Netherlands launched a campaign to limit the consumption of meat, particularly among men. Nevertheless, the local meat consumption has been stable since then. During the COVID-19 pandemic, meat sales through online supermarkets such as Picnic and HelloFresh have increased. The Netherlands has one of the highest e-commerce penetrations because the population has strong internet skills.

Competitors in the Netherlands

When the United Kingdom left the EU, the Netherlands became the largest importer of Canadian beef of all the European Union countries.
The beef sector in the Netherlands is considered an oligopoly, where the market is shared by a small number of sellers that sell beef in three different categories[7]:

- shelf stable processed red meat is led by Unilever Group with 39 per cent of the market share, followed by Private Label (31 per cent), Struik Foods Europe (13 per cent), Zwanenberg Food Group (10 per cent), and smaller companies under the category of others have seven per cent of the market share.
- chilled processed read meat is led by private label brands with 91 per cent of the market share, followed by other brands (five per cent), Zwanenberg Food Group (two per cent) and WH group with two per cent of the market share.
- Frozen processed red meat is led by McCain Foods Ltd with 63 per cent of the market share, followed by Private Label (22 per cent), Koninklijke Wessanen (10 per cent), Bofrost Dienstleistung GmbH & Co Kg (one per cent) Eismann Tiefkuhl-Heimservice GmbH (one per cent), The Meat Lovers BV (one per cent) and smaller companies under the category of others have two per cent of the market share.

Current market size and forecast 2020 to 2025

The estimated 2020 market size of beef by retail value in the Netherlands is $2.2 billion and 142,900 tonnes. The chilled beef category has a retail value of $1.8 billion whole, the frozen beef category is estimated at $229.3 million

[4] https://www.foodingredientsfirst.com/news/disturbing-news-meat-consumption-up-in-the-netherlands-despite-buoyant-plant-based-trend.html
[5] https://www.wur.nl/en/Dossiers/file/Meat-consumption.htm
[6] https://www.tasteatlas.com/most-popular-meat-dishes-in-netherlands
[7] EuroMonitor

(Table 1). These two categories have been forecast to grow between 2020 and 2025 by 1.1 per cent and 1.8 per cent, respectively. The shelf stable meat category shows only 0.1 per cent volume growth for the above period.

Table 1. **Market size and forecasted volume CAGR for the Netherlands processed red meat categories**

Type of Processed Red Meat	2020 Market Size by Retail Value RSP (CAD million†)	2020 Market Size by Total Volume (000 tonnes)	Forecasted Volume Growth 2020-2025 CAGR %
Shelf Stable	$152.7	16.3	0.1%
Chilled	$1,795.3	95.4	1.1%
Frozen	$229.3	31.2	1.8%

Source: Euromonitor †Exchange rate 1 Euro = 1.55 CAD.

The Netherlands beef production and trade balance

The Dutch cattle industry focuses primarily on producing milk, but also supplies high-quality meat. Dutch beef has a reputation for nutritional and culinary quality, with a controlled production process and reliable traceability system.[8] The Dutch national cattle inventory declined from 2015 to 2018 due to exceeding EU pasture phosphate limits. In 2018, beef cattle numbers declined by 8.4 per cent to 3,690,000 head.[9]

The Netherlands beef imports

Globally, the Netherlands was the third-largest beef importer in the EU27 in 2020, with imports averaging $2.8 billion annually over the last five years (2016-2020). As shown in Table 2, the main category of imports is fresh and chilled beef, reaching $2.1 billion in 2020, while frozen beef imports were estimated at $407 million.[10] Historical imports show a small but steady annual increase in import values up to 2019, except for 2020 where there was a decline of 2.22 per cent from the previous year.

In 2020, the Netherlands imported beef from approximately 80 countries around the world. Table 3 shows the top suppliers of fresh, chilled and frozen beef to the Netherlands between 2016 and 2020. The top five countries exporting fresh and chilled beef to the Netherlands in 2020 (measured in value) include Germany, Belgium, Argentina, Ireland and the United States; while the top five exporters of frozen beef (measured in value) to the Netherlands are Germany, Brazil, Poland, the United Kingdom and Ireland. The top main countries are mostly in the European continent, except the ones that need exceptional conditions for cattle to thrive like Argentina and Brazil. The European Union has an international trade agreement with the South American countries (Argentina, Brazil, Paraguay and Uruguay) through the Southern Common Market (MERCOSUR for its Spanish initials). The agreement has yet to be ratified by the parliaments of the constituent countries of the EU. Once ratified, the countries of the MERCOSUR will be able to have easier access to the Netherlands and the EU as a whole, and be direct competitors to Canadian beef.

Imported frozen bovine meat to the Netherlands has increased since 2016, with a CAGR of 2.12 per cent, indicating potential market opportunities for Canadian beef suppliers. Based on the trends in the market size and forecast volume growth between 2020 and 2025, opportunities exist to expand Canadian market share within the chilled and frozen processed red meat categories in the Netherlands. From 2020 to 2025, the chilled and frozen meat categories are forecast to grow by 1.1 per cent and 1.8 per cent. However, as per the data shown in Tables 2, 3 and 4, the COVID-

[8] http://www.thebeefsite.com/articles/2436/cattle-in-the-netherlands/#:~:text=The%20Dutch%20cattle%20industry%20focuses,it%20comes%20from%20dairy%20cows
[9] https://euromeatnews.com/Article-Dutch-beef-production-takes-the-first-dive-in-4-years/3169
[10]Global Trade Tracker – April 2021

19 global pandemic appears to have affected imported beef, with a drop in frozen meat in 2020 from the previous year, and a below average amount for imported fresh meat in 2020 compared to previous years.

Table 2. **The Netherlands imports of Frozen, Fresh and Chilled beef 2016-2020.**

Canadian Dollars	2016	2017	2018	2019	2020	2016-2020
Frozen	$374,307,894	$397,603,412	$435,090,620	$447,997,237	$407,026,523	2.12%
Fresh and Chilled	$2,390,640,901	$2,403,069,895	$2,495,290,477	$2,407,079,195	$2,120,376,419	-2.95%
Total	$2,764,948,795	$2,800,673,307	$2,930,381,097	$2,855,076,432	$2,527,402,942	-2.22%

Source: Global Trade Tracker

Table 3. **Top 10 global suppliers of fresh, chilled & frozen bovine meat to the Netherlands 2016-2020.**

Country Fresh & Chilled	2016-2020 CAD($)	%	2016 ($)	2017 ($)	2018 ($)	2019 ($)	2020 ($)	CAGR 2016-2020
World	***11,816,456,889***	***100.00%***	***2,390,640,902***	***2,403,069,895***	***2,495,290,478***	***2,407,079,196***	***2,120,376,418***	***-2.95%***
Germany	1,747,972,604	14.79%	346,683,917	353,031,764	373,583,615	352,083,539	322,589,769	-1.78%
Belgium	1,268,425,077	10.73%	236,620,205	254,953,666	308,671,133	247,050,476	221,129,597	-1.68%
Argentina	1,081,284,346	9.15%	180,030,289	211,982,870	248,937,039	244,422,710	195,911,438	2.14%
Ireland	1,041,729,667	8.82%	214,981,039	198,431,937	224,882,398	200,266,212	203,168,081	-1.40%
United States	884,006,183	7.48%	202,868,289	190,291,841	157,841,470	163,349,172	169,655,411	-4.37%
Uruguay	878,161,023	7.43%	165,174,814	183,971,410	185,875,285	182,930,229	160,209,285	-0.76%
United Kingdom	722,017,308	6.11%	133,789,538	136,865,185	147,779,061	177,293,570	126,289,954	-1.43%
Poland	717,255,429	6.07%	145,783,784	141,233,961	123,016,667	149,343,443	157,877,574	2.01%
Australia	670,500,911	5.67%	154,620,883	159,185,209	122,449,388	137,055,496	97,189,935	-10.96%
Brazil	547,710,809	4.64%	145,218,228	121,176,983	112,073,980	90,423,593	78,818,025	-14.17%

Source: Globe Trade Tracker April 2021

Country Frozen	2016-2020 CAD($)	%	2016 ($)	2017 ($)	2018 ($)	2019 ($)	2020 ($)	CAGR 2016-2020
World	***2,062,025,689***	***100.00%***	***374,307,897***	***397,603,413***	***435,090,619***	***447,997,238***	***407,026,522***	***2.12%***
Germany	441,287,378	21.40%	77,220,562	91,690,122	95,535,165	98,876,386	77,965,143	0.24%
Brazil	368,651,032	17.88%	66,084,850	73,668,406	87,122,422	77,457,865	64,317,489	-0.68%
Belgium	182,278,935	8.84%	27,391,680	30,510,742	47,038,890	42,547,841	34,789,782	6.16%
United Kingdom	177,985,836	8.63%	30,301,155	31,254,303	41,208,856	39,964,273	35,257,249	3.86%
Ireland	158,710,818	7.70%	26,119,860	27,880,997	28,262,549	34,159,859	42,287,553	12.80%
Poland	143,710,680	6.97%	12,556,779	19,020,202	28,219,185	43,347,545	40,566,969	34.07%
Uruguay	135,544,632	6.57%	29,178,761	36,897,626	31,167,796	21,081,394	17,219,055	-12.35%
New Zealand	117,040,353	5.68%	30,277,366	23,266,627	27,544,436	18,787,766	17,164,158	-13.23%
Spain	105,339,215	5.11%	24,823,937	21,428,167	12,893,857	19,827,369	26,365,885	1.52%
Namibia	40,062,358	1.94%	16,529,688	9,301,467	0	14,231,203	0	-4.87%

Source: Globe Trade Tracker April 2021

Table 4. **Quantity of bovine meat imported by the Netherlands in 2016-2020 with top 10 suppliers.**

Country	***2016-2020***	***2016***	***2017***	***2018***	***2019***	***2020***	***CAGR 2016-2020***
Fresh & Chilled	***tonnes***	***tonnes***	***tonnes***	***tonnes***	***tonnes***	***tonnes***	
World	***1,744,172***	***360,286***	***350,299***	***355,235***	***358,639***	***319,712***	***-2.95%***
Germany	369,027	81,533	74,030	72,722	73,455	67,287	-1.78%
Belgium	224,974	40,356	46,648	55,881	42,088	40,002	-1.68%
Poland	166,087	36,608	32,456	25,676	34,320	37,027	2.14%
United Kingdom	122,298	20,306	20,940	24,251	36,319	20,483	-1.40%
Ireland	120,836	23,313	23,233	25,958	25,510	22,822	-4.37%
Argentina	73,023	10,328	12,936	17,208	17,529	15,022	-0.76%
Uruguay	67,870	12,514	14,718	14,520	13,992	12,126	-1.43%
United States	51,154	11,592	11,692	9,442	9,189	9,239	2.01%
Brazil	45,499	10,854	9,153	9,331	8,421	7,739	-10.96%
Australia	43,274	10,608	10,399	7,848	8,529	5,890	-14.17%

Source: Globe Trade Tracker April 2021

Country	***2016-2020***	***2016***	***2017***	***2018***	***2019***	***2020***	***CAGR 2016-2020***
Frozen	***tonnes***	***tonnes***	***tonnes***	***tonnes***	***tonnes***	***tonnes***	
World	***281,544***	***54,996***	***52,015***	***54,997***	***62,845***	***56,690***	***2.12%***
Germany	66,095	14,469	12,818	13,274	13,658	11,875	0.24%
Brazil	42,299	7,352	7,679	10,053	9,747	7,468	-0.68%
Belgium	27,419	3,998	4,561	6,979	6,343	5,539	6.16%
United Kingdom	24,793	5,275	4,290	5,398	5,530	4,301	3.86%
Poland	24,371	1,893	3,019	4,330	8,007	7,122	12.80%
Ireland	23,303	4,059	3,807	3,567	5,131	6,739	34.07%
Spain	19,508	4,974	4,231	2,090	3,766	4,447	-12.35%
Uruguay	14,913	3,334	4,428	3,277	2,042	1,832	-13.23%
New Zealand	7,652	1,885	1,337	1,582	1,389	1,459	1.52%
Namibia	6,175	2,450	1,445	0	2,280	0	-4.87%

Source: Globe Trade Tracker April 2021

Canadian exports to the Netherlands show a steady increase as per Table 5, with a small market share below 0.5 per cent.

Table 5. **Canadian beef exports to the Netherlands 2016-2020 (Canadian dollars)**

	2016	***2017***	***2018***	***2019***	***2020***	***Total***
Beef of bovine animals, fresh or chilled	2,657,414	6,629,082	7,063,516	6,104,282	8,152,388	30,606,682
Beef of bovine animals, frozen	0	0	0	11,208	0	11,208
Total	2,657,414	6,629,082	1,063,516	6,115,490	8,152,388	30,617,890

Source: Catsnet May 2021

The Netherlands beef exports

Globally, the Netherlands exported a total of 449,000 tonnes of beef, valued at $3.8 billion[11] in 2020. Most of the beef was exported as fresh and chilled meat, specifically 396,037 tonnes of fresh and chilled meat and 52,931 tonnes of frozen meat.

The Netherlands exported beef to more than 60 countries in 2020. The top export countries belong to the EU and include Germany, France, Italy, Denmark and Spain. The EU agreement and its regulations benefit trade among all EU countries. As shown in Table 6, Ghana is also listed as a top export country for the frozen beef category. It is interesting to note that Ghana's Economic Partnership Agreement (EPA)[12] with the European Union provides progressively reduced tariffs to zero for 78 per cent of its imports by 2029.

Table 6. **Top 5 export destinations of fresh, chilled & frozen bovine meat from the Netherlands in 2016-2020.**

		2016-2020		2016	2017	2018	2019	2020
	Country	tonnes	%	tonnes	tonnes	tonnes	tonnes	tonnes
Frozen	***World***	***265,167***	***100.00%***	***44,883***	***54,649***	***52,049***	***60,655***	***52,931***
	Germany	61,045	23.02%	11,402	12,792	12,324	14,094	10,433
	France	28,048	10.58%	5,069	5,780	6,458	5,918	4,823
	Italy	22,239	8.39%	3,159	5,448	5,993	3,261	4,378
	Belgium	17,762	6.70%	4,175	3,296	3,442	3,770	3,079
	Ghana	15,513	5.85%	31	120	830	7,843	6,689
Fresh and chilled	Country	2016-2020		2016	2017	2018	2019	2020
		tonnes	%	tonnes	tonnes	tonnes	tonnes	tonnes
	World	***2,115,277***	***100.00%***	***417,613***	***417,254***	***426,323***	***427,431***	***396,037***
	Germany	639,159	30.22%	121,537	121,195	130,668	130,398	126,295
	France	327,199	15.47%	65,813	65,410	69,184	66,016	56,584
	Italy	286,132	13.53%	59,852	53,956	54,626	56,853	56,111
	Denmark	135,832	6.42%	28,894	32,152	26,386	23,340	23,385
	Spain	92,493	4.37%	17,023	18,414	18,928	19,585	17,133

Source: Global Trade Tracker April 2021.

Balance between imports and exports

It is interesting to note the balance between imports and exports as can be seen in Table 7. There is an important positive balance for the Netherlands. This could lead us to conclude that the Netherlands meat processing capacity is adding value to imported beef so the beef can be sold to other countries, as the amounts in weight are relatively similar but the differences in value are considerably higher.

Table 7. **Comparison between exports and imports done by the Netherlands in 2020.**

	Imports 2020			Exports 2020		
	tonnes	CAD($)	CAD($)/ tonne	tonnes	CAD($)	CAD($)/ tonne
Fresh & Chilled	319,712	2,120,376,418	6,632	396,037	3,403,262,897	8,593
Frozen	56,690	407,026,522	7,180	52,931	389,573,397	7,360
Total	376,402	2,527,402,940	6,715	448,968	3,792,836,294	8,448

[11] Global Trade Tracker April 2021

[12] https://trade.ec.europa.eu/doclib/docs/2020/october/tradoc_158987.pdf

Supply chain dynamics

The Netherlands is a logistical center for Europe because of its location and proximity to the sea. It has railways, roadways and inland waterways abound, and major seaports at Delfzijl, IJmuiden and Vlissingen, making it one of the easiest countries in the world for moving manufactured goods and raw materials. In addition, the country has a container port and an LNG port, multiple river ports and 29 airports. In 2015, registered air carriers moved more than five billion kilometre tonnes of airfreight.[13]

Distribution channels

Hypermarkets were the best performing channel in grocery retailing in 2019. Although it remained a small channel in grocery retailing in the Netherlands, with 41 outlets, AH XL and Jumbo Groep saw strong sales growth in their existing stores. Discounters continued to outperform modern grocery retailers and supermarkets in particular. Nevertheless, the rate at which discounters were gaining value share from other grocery channels slowed in 2019 in comparison with previous years.

Approximately 80 per cent of Dutch food retail outlets are full service supermarkets, located in downtown and in residential areas. The remaining 20 per cent include mainly convenience stores, some wholesalers and just a few superstores (located in shopping malls and industrial parks).
The market share in the Netherlands retail industry is quite consolidated. In 2019, the main actors were: Albert Hejin (34.9 per cent), Superunie (27.5 per cent), Jumbo Groep (21 per cent), Lidl (10.7 per cent) and Aldi Holding (5.9 per cent).[14]

Most of the food retail stores are full-service supermarkets. In addition, there are some department stores (HEMA and Bijenkorf), convenience stores, gas markets (On the Run, Snack & Shop Shell Station, GO shops – the fresh way, Café Bonjour and Wild Bean Café) and wholesalers (De Kweker, Sligro, Makro, Bidfood, VHC – Horesca, Hanos and Zegro) that all sell food products.[15]

CETA implications

The Netherlands is a member of the European Union (EU). The Canada-European Union Comprehensive Economic and Trade Agreement (CETA) gives Canadian companies the opportunity to have preferential tariffs in the EU, accessing infinite opportunities for growth. It also gives them the opportunity to do business in a market with 510 million consumers, including the Netherlands with its 17.4 million people by:

- reducing or eliminating tariffs on products imported into the EU, at almost 98 per cent duty free for Canadian products
- reinforcing intellectual property rights
- improving and expanding market access for Canadian products
- providing more transparent rules for market access[16]
- improving certainty for investments

The Canadian Embassy in the Netherlands indicates that there is still a significant challenge for Canadian exporters getting their Canadian slaughterhouses approved by the EU competent body, authorizing them to export to the EU.

[13] https://www.qad.com/blog/
[14] https://www.qad.com/blog/
[15] https://www.nordeatrade.com/en
[16] https://www.agr.gc.ca/eng/agriculture-and-agri-food-canada/

However, the exports of Canadian beef are growing slowly and the Netherlands is the main market in the EU27 (UK is no longer a member of the EU). Canadian beef exporters claim it is still hard to get access to the EU beef quota. Still, under CETA, the beef quota is under-utilized because Canada does not have enough EU certified slaughterhouses and this reduces beef export capacity.

Market access regulations

Growth Enhancing Products (GEPs) are widely used in North America cattle production but are not permitted by the EU. GEPs include: hormone implants, beta agonists in cattle feed and melengesterol acetate (MGA). However, antibiotics and coccidiostats are permitted.

For Canadian Cattle producers to be eligible to export into the EU, they must join the GEP Free Program. This program is designed to deliver on the expectations of the EU market place.[17]
Canadian cattle that is in production to be exported to the EU must be enrolled in the Certifying Freedom from GEP Program. To enroll, cattle operations have to be visited by a CFIA approved veterinarian.

Some requirements of this program include:[18]

- If GEPs are used on the farm, there must be well-defined procedures to ensure complete separation of the cattle to be exported to the EU from other cattle.
- Eligible cattle are subject to inspection and randomized lab testing to comply with EU clients.

[17] https://www.cattle.ca/market-access/market-access-requirements
[18] https://www.cattle.ca/market-access/market-access-requirements/eu/

Key contact organizations

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Cold storage and distribution of meats in Europe
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Logistics companies (trucks, storage, re-labeling, terminals, and custom brokers):
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Note: This person represents 350 logistic service providers, their members, based in the Netherlands.

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www.quad.com/blog

www.nordeatrade.com

www.agr.gc.ca/eng

www.canada.ca/eng

www.cattle.ca

Others:

Catsnet

Euromonitor

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Available in alternate formats upon request.