This market profile has been developed within the framework of the Market Access Upgrade Programme (MARKUP) – Tanzania Window (TZ1.1.1)
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1.0 PRODUCT OVERVIEW
Cocoa beans are the dried and fermented seeds of the cacao plant (Theobroma Cacao) of which cocoa butter and cocoa solids are extracted. Cocoa butter is a creamy-colored edible vegetable fat with a cocoa flavor and aroma used to make chocolate, as well as several ointments, toiletries and pharmaceutical products while Cocoa solids are the light brown or reddish-brown substances that remain after cocoa butter often in the form of cocoa powder mainly used in the production of chocolate and other confectionery. It has been distinguished into three types that is; Forastero, Criollo and Trinitario which is the high grade cocoa.

Benefits of Cocoa;

1. *Antioxidant Powerhouse*: It is one of the richest antioxidants in the world!! The flavanols found in raw cacao have been shown to lower blood pressure, improve blood flow to the brain and fight cell damage. Raw forms of chocolate, like these cacao beans, contain the highest concentrations of flavanols.

2. *Rich in Minerals*: Cacao beans are an excellent source of iron, magnesium and even calcium. One cup of these organic cacao beans provides 429 milligrams of magnesium, which is 107 percent of the recommended daily value (RDV). The same serving also provides over 60 percent of the RDV for iron and 11 percent of the RDV for calcium.

3. *Good Source of Fiber*: Most Americans don't get the recommended daily value for fiber, which is 25 to 30 grams a day from food, not supplements. Luckily, you can get five grams of dietary fiber in every one-ounce serving of raw cacao beans. The fiber found in this nutritious food can help support the digestive system and lower LDL cholesterol levels.

Cocoa Beans have HS Code 180100 in the Harmonized system with Tanzania National Tariff Line 18010000 which are the codes used to classify products and to calculate international trade statistics, such as imports and exports.

2.0 WORLD PRODUCTION AND CONSUMPTION

2.1 Production
According to International Cocoa Organization (ICCO) the production of cocoa in the world is estimated to be 4,739,000 tonnes in 2019 and Africa is the leading producer of cocoa of which in 2017 produced about 3,622,000 tonnes followed by America 760,000 tonnes and Asia & Oceania 357,000 tonnes.

2.2 Consumption
The consumption of cocoa is estimated to be 4,727,523 tonnes mostly consumed by European countries. Europe is a dominant force in the cocoa sector, representing more than half of global cocoa bean imports.

2.3 Tanzania Production Capacity
In Tanzania, we have 3 varieties that are being produced including Forastero, Criollo, Trinitario. The total volume produced is 23,000 tonnes in 2017 (*Ministry of Agriculture*) and there are several varieties being exported including: Raw cocoa, Cocoa powder and Cocoa waste.
Seasonality of production: Normally the production increases from May and reaches its peak during October with the exception of Morogoro region which has a privilege of producing throughout the year (Source: Ministry of Agriculture).

The areas that cultivate Cocoa are in the region of Mbeya-Kyela, Rungwe, Morogoro- Mvomero, Ifakara and Tanga - Maramba also Kigoma has shown potential of producing the product.

There are about four companies working in the sector such as Kokoa Kamili, Biolands International Limited etc and companies engaged in the export of cocoa are Olam, Mohamed Enterprises Ltd, World Botanical Products Ltd and others (Source: TRA)

### 3.0 GLOBAL TRADE CHARACTERISTICS

#### 3.1 Import Characteristics

In 2018, the total imports of cocoa beans (HS 180100) amounted 9.8 billion USD. Over the last five years, the annual growth in value and quantity was 1% and 9% respectively implying that the market has increased at 1% average annual rate in value and 9% average annual rate in volume hence, there was an upward pressure in quantity than the value implying cocoa was cheaper. The importers of the product are approximately 125 and major importers are Netherlands, Germany and USA of which they make a total share of 49.4% of all imports hence making the world demand of cocoa beans to be moderately concentrated.

<table>
<thead>
<tr>
<th>Importers</th>
<th>Value imported in 2018 (USD thousand)</th>
<th>Trade balance in 2018 (USD thousand)</th>
<th>Quantity imported in 2018 Unit</th>
<th>Unit value (USD/unit)</th>
<th>Annual growth in value between 2014-2018 (%)</th>
<th>Annual growth in quantity between 2014-2018 (%)</th>
<th>Annual growth in value between 2017-2018 (%)</th>
<th>Share in world imports (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>9774691</td>
<td>-117301</td>
<td>4125148 Tons</td>
<td>2370</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>100</td>
</tr>
<tr>
<td>Netherlands</td>
<td>2660269</td>
<td>-202547</td>
<td>1172508 Tons</td>
<td>2269</td>
<td>8</td>
<td>16</td>
<td>3</td>
<td>27.2</td>
</tr>
<tr>
<td>Germany</td>
<td>1177855</td>
<td>-114865</td>
<td>469485 Tons</td>
<td>2509</td>
<td>10</td>
<td>16</td>
<td>26</td>
<td>21.1</td>
</tr>
<tr>
<td>United States of America</td>
<td>990199</td>
<td>-96904</td>
<td>415158 Tons</td>
<td>2385</td>
<td>9</td>
<td>14</td>
<td>7</td>
<td>10.1</td>
</tr>
<tr>
<td>Malaysia</td>
<td>791222</td>
<td>-43775</td>
<td>345469 Tons</td>
<td>2120</td>
<td>-5</td>
<td>7</td>
<td>14</td>
<td>8.1</td>
</tr>
<tr>
<td>Belgium</td>
<td>592966</td>
<td>-96411</td>
<td>233636 Tons</td>
<td>2538</td>
<td>-8</td>
<td>0</td>
<td>-26</td>
<td>6.1</td>
</tr>
<tr>
<td>Indonesia</td>
<td>528946</td>
<td>-45650</td>
<td>239277 Tons</td>
<td>2210</td>
<td>21</td>
<td>35</td>
<td>9</td>
<td>5.4</td>
</tr>
<tr>
<td>France</td>
<td>420220</td>
<td>-42432</td>
<td>155910 Tons</td>
<td>2695</td>
<td>25</td>
<td>5</td>
<td>0</td>
<td>4.3</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>264410</td>
<td>-261986</td>
<td>1139260 Tons</td>
<td>2327</td>
<td>19</td>
<td>21</td>
<td>8</td>
<td>2.7</td>
</tr>
</tbody>
</table>

Source: ITC Trade Map

#### 3.2 Export Characteristics

In 2018, the total exports of cocoa beans (HS 180100) amounted 9.4 billion USD. Over the last five years, the annual growth in value and quantity was 2% and 6% respectively hence, implying cocoa was sold cheaper. There are many exporters of the product about 105 countries lead by Cote D Voire, Ghana and Ecuador of which they make a total share of 65.8% of all exports hence making the world supply of cocoa beans to be highly concentrated.
4.0 COUNTRY’S EXPORT PERFORMANCE

Tanzania represents 0.2% of world exports of cocoa and it is ranked number 24 in the world exports. Over the past year Tanzania exported cocoa beans worth 18.4 million usd and quantity amounted 10,157 tonnes. Over the last five years, the annual growth in exports has decreased by 7% average annual rate in value hence comparing with the world average (-2%), Tanzania is losing market share. The three biggest importers of Tanzania’s cocoa beans were Belgium, Malaysia and India imported the product with value worth 7.1 million usd, 5.3 million usd and 2.1 million respectively.

4.1 Exporters of Cocoa beans

The major cocoa exporters in 2018 are Cote d’Ivoire, Ghana and Ecuador with the share of exports 33.7%, 25.2% and 6.9% respectively. The concentration of supplying countries is highly concentrated implying that the market is supplied by few exporters.
4.2 Cocoa Beans Performance

From the below graph the leading importer of Tanzanian cocoa beans in 2018, is Belgium buying 39.01% of Tanzanian cocoa and noticing the blue bubble which implies Tanzania is gaining market share because the imports from the world are growing slower than the imports form Tanzania. Second is Malaysia which is buying 28.88% of Tanzanian cocoa but with the yellow bubble Tanzania is losing market share in Malaysia because the imports from the world are growing faster than the imports from Tanzania. It also shows opportunities in markets that are experiencing faster growth in imports from the world such as South Africa and Indonesia plus some other markets with a significant size but Tanzania has less participation including Netherlands, Germany and United States of America (USA).

Source: ITC Trade Map

4.3 Tariffs faced by Tanzania

Source: ITC Market Access Map
Tanzanian cocoa beans exporters are facing the lowest tariff in that is 0% rate in the European countries including Netherlands, Belgium, Germany, France, others are Malaysia, China and United States of America meanwhile, it is imposed 5% tariff rate in countries such as Indonesia and United Arab Emirates and 21.30% tariff in India. The trade regimes applicable are Preferential trade Agreements for LDCs as well as MFN.

5.0 MARKET SCREENING
5.1 Attractive Markets
Netherlands has 27.2% share of world imports of cocoa beans valued about 2.7 billion usd making it the largest importer of cocoa beans followed by Germany 1.2 billion usd and Malaysia 8 million usd. Comparing the annual growth rate in value for the last 5 years, Netherlands and Germany market have been increasing but Malaysia declined.

<table>
<thead>
<tr>
<th>Target country</th>
<th>Imported value (000s $) in most recent year</th>
<th>Unit value ($/unit)</th>
<th>World market share (%)</th>
<th>Annual growth rate in value past 5 years (%)</th>
<th>Tariff advantage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 NETHERLANDS</td>
<td>2,660,266</td>
<td>2,269</td>
<td>27.2</td>
<td>8</td>
<td>0</td>
</tr>
<tr>
<td>2 GERMANY</td>
<td>1,177,852</td>
<td>2,509</td>
<td>12.1</td>
<td>10</td>
<td>0</td>
</tr>
<tr>
<td>3 MALAYSIA</td>
<td>791,224</td>
<td>2,290</td>
<td>8.1</td>
<td>-3</td>
<td>0</td>
</tr>
</tbody>
</table>

5.2 Selected Market
There is potential for Tanzania to export cocoa beans to the Netherlands as seen below that, the actual exports which is 855.6 thousand usd fall short of potential exports 20.2 million usd leaving the untapped potential of 19.4 million usd and hence it is a good market to consider while exporting. Currently Tanzania is exporting 726,200 usd value of cocoa while potential values 22.3 million usd leaving an untapped potential worth $21.6 million.

Source: ITC Export Potential Map
6.0 TARGET MARKET CHARACTERISTICS

6.1 Tanzania Trade Performance in Netherlands Market
Tanzania exports cocoa beans to Netherlands and it has the share of 0.2% of Netherlands’ cocoa beans imports. In 2018, Netherlands imported 368 tons with the value of US $ 1.3 million as shown in Graph 6.1. The average annual growth in imported value over the past 5 years in Netherlands from the world was 8% while the rate of growth of imported value over the past 2 years is 7% hence there is a slight change in the imports of cocoa.

Source: ITC Trade Map

6.2 Competition in a Target Market
The main competitors for Tanzanian cocoa beans in Netherlands market are Ivory Coast, Ghana and Nigeria. In 2018, Ivory Coast exported cocoa beans with the value of US $ 1.3 billion with volume about 589,354 tons, while Ghana exported 180,805 tons with the value US $ 428.8 million and Nigeria 146,650 tons valued US $ 313.4 million as shown below. The average distance of which Netherlands is buying from partner countries is 6,695km hence comparing Tanzania’s distance as well as that of competitors’ e.g Ivory Coast (6,915) and Ghana (8,756) we are competitively positioned geographically to compete in the Netherlands market. However, only Uganda is located at the equivalent distance (7,002 km) with Tanzania that is 7,471 km.
6.3 Import Seasonality

From the graph, the importation of Cocoa in Netherlands at the National Tariff Line level (18010000) varies in different quarters e.g. Ivory Coast was the top leading and mostly exported to Netherlands almost throughout the year the year while Ghana and others starts to rise from March and reaches its peak moments on June hence comparing with Tanzania’s production, we have an advantage to supply as our top season is between May and October.

Source: ITC Trade Map

Graph 6.3: List of supplying markets of cocoa beans to Netherlands in quarterly series from 2013-2018
6.4 **Country’s price positioning**

Prices Positioning for Tanzanian cocoa beans whole or broken, raw or roasted at the National Tariff Line level (NTL) HS Code **18010000** in the Netherlands market in 2017 was 3069.23 USD/ton hence the price was better compared to the average unit value imported by Netherlands from world (2,250 usd).

![Graph 6.4: List of supplying markets for a product imported by Netherlands Product: 18010000 Cocoa beans, whole or broken, raw or roasted](source: ITC Trade Map)

6.5 **Tariff faced and tariff advantage in target market**

The tariff applied by supplying country in Netherlands is 0% as shown in Table 6.5. Even though Netherlands has a Preferential tariff for Least Developed Countries which includes Tanzania still, Tanzania has no tariff advantage over the main competitors in Netherland market due to the fact Netherlands applies 0% tariff for all supplying countries.

![Graph 6.5: Geographical distribution for tariffs applied by Netherlands to all exporting countries of cocoa beans](source: ITC Trade Map)

Graph 6.5: Geographical distribution for tariffs applied by Netherlands to all exporting countries of cocoa beans
7.0 THE 6 P’s

7.1 Panorama;

<table>
<thead>
<tr>
<th>Political</th>
<th>Economic</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The government of the Netherlands is a constitutional monarchy</td>
<td>• The Netherlands has a developed economy, GDP growth 2.9%, GDP per capita 53,000 euro, Industrial production growth 3.3%.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Social factors</th>
<th>Technological factors</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Population is 17m, main language is Dutch and 2nd language is English.</td>
<td>• It is among the best countries for technology and innovation.</td>
</tr>
<tr>
<td>• The Netherlands has an annual chocolate consumption estimated at 4.7 kg per capita in 2014.</td>
<td>• It is home to the second-largest cocoa grinding industry, after the Ivory Coast.</td>
</tr>
<tr>
<td></td>
<td>• Availability of E-commerce</td>
</tr>
<tr>
<td></td>
<td>• Mobile network coverage allows 90% of Netherland population to use internet (July 2016 est.)</td>
</tr>
</tbody>
</table>

Source: Doing Business

7.2 Product
Cocoa beans is used in the production of cocoa powder and further processing into beverages, chocolates and desserts including cocoa pulp, chocolates etc. In 2014, The Netherlands had an annual chocolate consumption estimated at 4.7 kg per capita. Netherlands is the second importer of cocoa powder with 6.7% share of imports meanwhile Tanzania already sell cocoa powder to our neighboring countries therefore we have an opportunity to explore some new markets for cocoa powder in the Netherlands.

7.3 People
The market segment identified is Business to Business which includes manufacturers of chocolate and biscuits, as well as other food industries e.g. beverage & bakery industry of which they demand a lot of semi-finished cocoa products such as paste, butter, powder etc. The chocolate industry demands different products, depending on the capacities and scale of the manufacturer. Specialty cocoa is an increasingly interesting segment for exporters in producing countries as the trend for premium chocolate continuous in the Dutch chocolate market.

7.4 Permission

7.4.1 Tariff Faced By Competitors
The tariff faced by competitors in the exportation of cocoa beans at the National tariff line is 0%. Tanzania has no tariff advantage against its competitors. However, there are some regulations they need to follow before entering the Netherlands market.
<table>
<thead>
<tr>
<th>Country</th>
<th>Market share</th>
<th>Tariffs faced</th>
<th>Tariff regime</th>
<th>Tariff advantage for your country (yes or no)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tanzania</td>
<td>0.2%</td>
<td>0%</td>
<td>Preferential Tariff</td>
<td></td>
</tr>
<tr>
<td><strong>Tanzania main competitors in Netherlands market</strong></td>
<td>Market share</td>
<td>Tariffs faced by competitors</td>
<td>Tariff regime</td>
<td>Tariff advantage for your country (yes or no)</td>
</tr>
<tr>
<td>Cote D Voire’</td>
<td>33.7</td>
<td>0%</td>
<td>MFN</td>
<td>NO</td>
</tr>
<tr>
<td>Ghana</td>
<td>25.2</td>
<td>0%</td>
<td>MFN</td>
<td>NO</td>
</tr>
<tr>
<td>Nigeria</td>
<td>6.9</td>
<td>0%</td>
<td>MFN</td>
<td>NO</td>
</tr>
</tbody>
</table>

### 7.4.2 Regulations

There are regulatory requirements to be considered while exporting including, Sanitary and Phytosanitary Standards (SPS) including; geographical restrictions on eligibility, special authorization requirements for SPS reasons, labeling requirements as well as tolerance limit for residues and also Technical barriers to trade (TBT) including; Authorization requirement.

There are also voluntary standards requested by buyers eg GLOBAL G.A.P which are standards for the certification of agricultural production processes that provide safe and traceable products. Other standards includes Fair Trade International, Rainforest Alliance certificate, BRC global standards for food safety and Hazard analysis and critical control points (HACCP) which often is a minimum standard required at the level of storage and handling of cocoa beans.

**Packaging and Labeling Requirements**

There are different ways of packaging cocoa beans. Most used way of packaging is by bags of jute or sisal, usually of a (gross) weight of 60 - 65 kg. Some of packaging are; In the fine flavour / speciality cocoa segment, jute bags are still commonly used. On the mainstream market bulk shipment of cocoa beans has become more popular. This means cocoa beans are loaded directly into the ship’s cargo hold or in shipping containers containing a flexi-bag. This mega bulk method is often adopted by larger cocoa processors, which handle cocoa beans of standard qualities while for very high-quality microlots vacuum-sealed GrainPro packaging can be used. The bag should labeled with organization name, country of origin, crop year, net weight and lot batch. In the case your cocoa is organic or fair trade certified, the labels should contain the name/code of the inspection body and certification number.

### 7.5 Price

The cocoa bean surplus in the 2017 astounded the industry, and caused international prices to tumble. Compared to the previous season (2015/2016), there was an increase reflecting a 15% growth in world production. In 2018, World price in average was 2,370 USD/tonne, in Netherlands was 2,269 USD/tonne while Tanzania was able to sell at the average price of $3,576 hence making Netherlands the potential market as good as the quality it gets premium price.

### 7.6 Prospect

**Market Leads**
Centre for the Promotion of Imports from Developing Countries (https://www.cbi.eu/) as well as Diaspora of Tanzania can find through Embassy of Tanzania in the Netherlands (http://www.tanzaniaembassy.nl/).

Potential importers / traders - The large grinding industry in the Netherlands is attributed to the presence of large national and multinational grinders such as:
1. Cargill
2. ADM
3. ECOMDutchCocoa
4. ContinentalCandyIndustriesB.V
5. Strootman Group

In the specialty & fine flavour cocoa segment, direct trade is linked to platforms such as Direct Cacao and Cocoanect which connect producers with chocolate makers.

7.7 SWOT Analysis

<table>
<thead>
<tr>
<th>Strength</th>
<th>Weakness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tanzania has market share already in the target market (Source: TradeMap)</td>
<td>Low production of cocoa compared to increasing demand (Source: FAOSTAT)</td>
</tr>
<tr>
<td>Tanzania has better quality (organic) cocoa.</td>
<td>Poor finance and technical assistance for Tanzanian farmers to incorporate modern day farming techniques.</td>
</tr>
<tr>
<td>Strong demand of specialty, meaning better offer from consumers.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Threat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nederland is the gateway of cocoa sub-products to Europe (Source: CBI)</td>
<td>The farmer depends on rain for irrigation.</td>
</tr>
<tr>
<td>Specialty cocoa is an increasingly interesting segment for exporters in producing countries.</td>
<td>West Africa countries have larger market share.</td>
</tr>
<tr>
<td>Direct contact between European chocolate makers and producers is growing</td>
<td></td>
</tr>
<tr>
<td>Potential to explore other sub-product such as cocoa powder.</td>
<td></td>
</tr>
<tr>
<td>Possible to export to other countries such Belgium and Germany</td>
<td></td>
</tr>
<tr>
<td>Good prices of cocoa supports small scale farmers to alleviate poverty</td>
<td></td>
</tr>
</tbody>
</table>

8.0 RECOMMENDATIONS AND NEXT STEPS

8.1 Recommendations
   i. Strengthen the Cooperative Unions through capital finance
   ii. Train farmers on GAP to meet market demand requirements (voluntary and involuntary)
   iii. Establish grinding factory in Tanzania for value addition of cocoa
   iv. Create market linkages for Tanzania exporters and the potential markets
   v. Market diversification of which Tanzania is currently largely exporting to hence we will be able to diversify and gain the market share for cocoa powder in Netherlands
8.2 Next steps
   i. Increase production by exhausting the lands which have potential to produce cocoa e.g Kigoma region
   ii. TanTrade and other trade facilitators should mobilize farmers, exporters and train them the potential of the product in the world market and the target market
   iii. Facilitate farmers (e.g subsidies) with quality seeds, fertilizers which are resistance to pests and diseases
   iv. Organizing buyer seller meetings as well as participating in trade fairs, expos so as to promote cocoa from Tanzania

9.0 USEFUL SOURCES

Information about the culture, way of doing business in the Netherlands
   i. It’s typical to shake hands and say your first and last name.
   ii. During a conversation, the Dutch expect rather intensive eye contact, looking somebody straight into the eyes is interpreted as trustworthy.
   iii. Punctuality in business is regarded as a virtue.
   iv. The Dutch are dedicated to business meetings to ensure consensus, they are still conscious of the passage of time.
   v. The Dutch tend to get right down to business and negotiations proceed at a rapid pace. They are known to be forceful, stubborn and tough negotiators, while honesty and reliability are perceived as vitally important in business culture in the Netherlands.

Buyers of Cocoa

<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>Phone</th>
<th>Fax</th>
<th>Email</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continental Candy Industries B.V</td>
<td>De Bolder 40</td>
<td>(31) 512 – 525 880</td>
<td>(31) 512 – 525 818</td>
<td><a href="mailto:info@ccicandy.nl">info@ccicandy.nl</a></td>
<td><a href="http://www.ccicandy.nl">www.ccicandy.nl</a></td>
</tr>
<tr>
<td>Strootman Group B.V</td>
<td>Oudlandsedijk 10</td>
<td>0031 (0) 165 315 555</td>
<td>0031 (0) 165 315 155</td>
<td><a href="mailto:info@strootman.com">info@strootman.com</a></td>
<td><a href="http://www.strootman.com">www.strootman.com</a></td>
</tr>
<tr>
<td>DUTCH COCOA B.V</td>
<td>Oceanenweg 1</td>
<td>+31 20 4077600</td>
<td></td>
<td><a href="mailto:info@dutchcocoa.nl">info@dutchcocoa.nl</a></td>
<td><a href="http://www.dutchcocoa.nl">http://www.dutchcocoa.nl</a></td>
</tr>
<tr>
<td>DOBLA BV</td>
<td>Galileistraat 26</td>
<td>+31(0)72 576 07 77</td>
<td>+31(0)72 574 60 14</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

References
   i. The International Association of Cocoa [https://www.icco.org](https://www.icco.org)
   ii. http://www.doingbusiness.org
   iii. The Central Intelligence Agency [https://www.cia.gov](https://www.cia.gov)
   iv. ITC [https://www.trademap.org](https://www.trademap.org)
   vi. CBI [https://www.cbi.eu/](https://www.cbi.eu/)