

Strengthening resilience in the European potato value chain

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Just over halfway through 2026, the Northwest European potato sector has already faced a series of significant challenges. Geopolitical tensions in the Middle East have disrupted energy and fertilizer markets, while drought conditions threaten to erode yields after last year's record harvests. Together, these developments highlight a clear trend: volatility has become a defining characteristic of the potato value chain, and resilience is no longer optional, it is essential.

Summary

- The Northwest European processed potato value chain remains structurally strong, but its risk profile is rising. The main vulnerabilities are upstream in primary production, where climate-driven yield volatility, pest and disease pressure, and tighter environmental regulation are increasing production uncertainty and risk. Regional concentration supports scale and efficiency, but also increases exposure to shocks that affect many growers at the same time.
- Downstream risks are more manageable, but not irrelevant. Export markets are diversified, inflation is expected to remain relatively stable, and the current estimated impact of GLP-1 adoption in Europe is limited. At the same time, competition from emerging exporters is becoming more structural, especially in non-EU markets, putting pressure on EU processors to maintain efficiency and to stay competitive on global markets. It might be worthwhile to consider a switch from an EU-centric export model to a local-for-local model.
- Resilience will depend on coordinated action across the value chain rather than isolated measures. Priorities include irrigation and drainage, resilient varieties, flexible sourcing, crop-protection innovation and financing for long-term adaptation. The sector's ability to organize these investments will determine whether Northwestern Europe remains the global benchmark for processed potato production.

Risk travels down the processed potato value chain

Northwestern Europe is the centre of Europe's processed potato industry. In the main potato-processing countries (Belgium, Netherlands, France, and Germany), ware potato area exceeded [600,000 hectares in 2025](#). This is roughly 40% of the total potato area in the EU (source: Eurostat). This concentration supports scale, efficiency and global competitiveness, but it also creates exposure: when shocks hit the region, they can quickly affect a large number of growers, processors, retailers and even global markets.

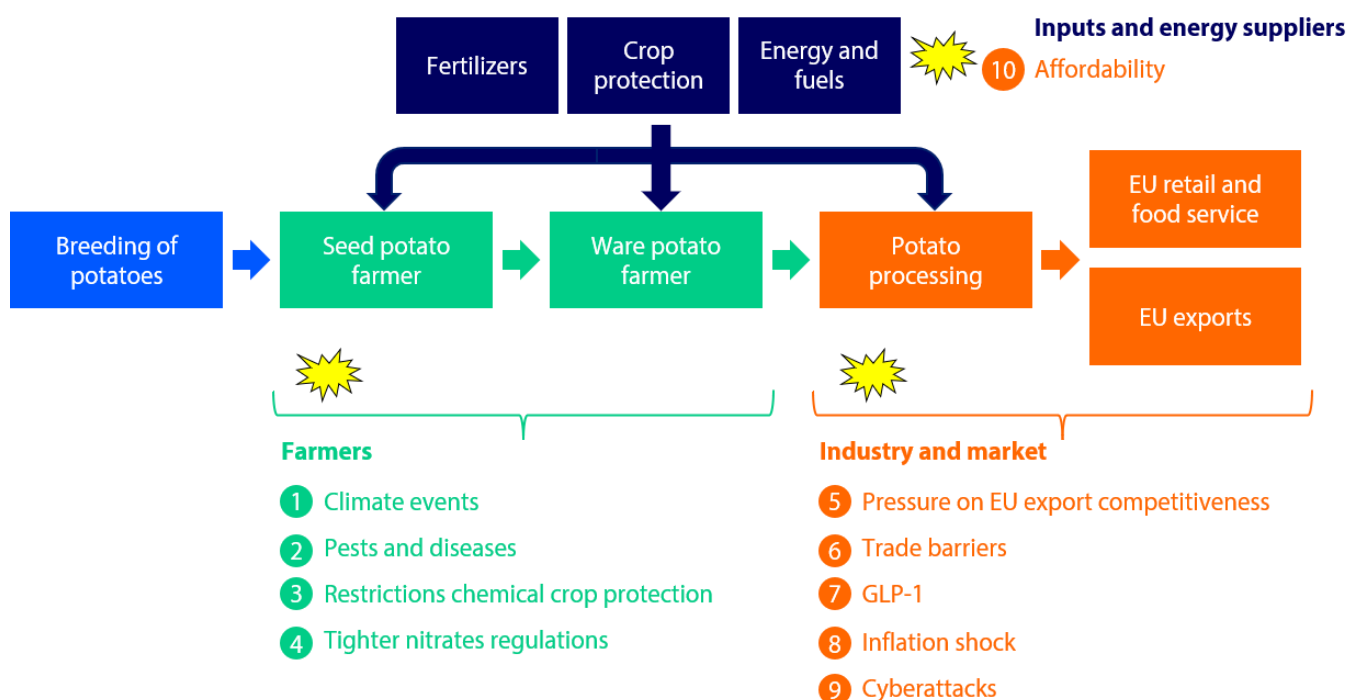
A severe drought illustrates this vulnerability. Lower ware-potato harvests may be partly offset for farmers by higher spot prices, but the pressure quickly shifts downstream. Processors face raw-material shortages, rising costs, underutilized capacity and weaker competitiveness, while retailers face higher prices, stock-out risks and the need for rapid sourcing adjustments.

This is not hypothetical. In 2018, an unusually wet spring followed by an exceptionally hot and dry summer, drove Dutch potato yields 16% below average, while prices more than doubled compared with the previous year. Climate risk is only one

driver of supply-chain volatility. Demand shifts, regulatory change, geopolitical disruptions, and cyber risks can also affect the chain.

Risk in the processed potato sector rarely stays confined to one stage of the value chain. These changing dynamics, whether sudden shocks or gradual stresses, challenge the resilience¹ of the chain. This report maps the main vulnerabilities in the Northwest European processed potato value chain and sets out recommendations to strengthen resilience.

Figure 1: The processed potato value chain and its main vulnerabilities



Source: RaboResearch 2026

Primary production is the main source of value chain vulnerability

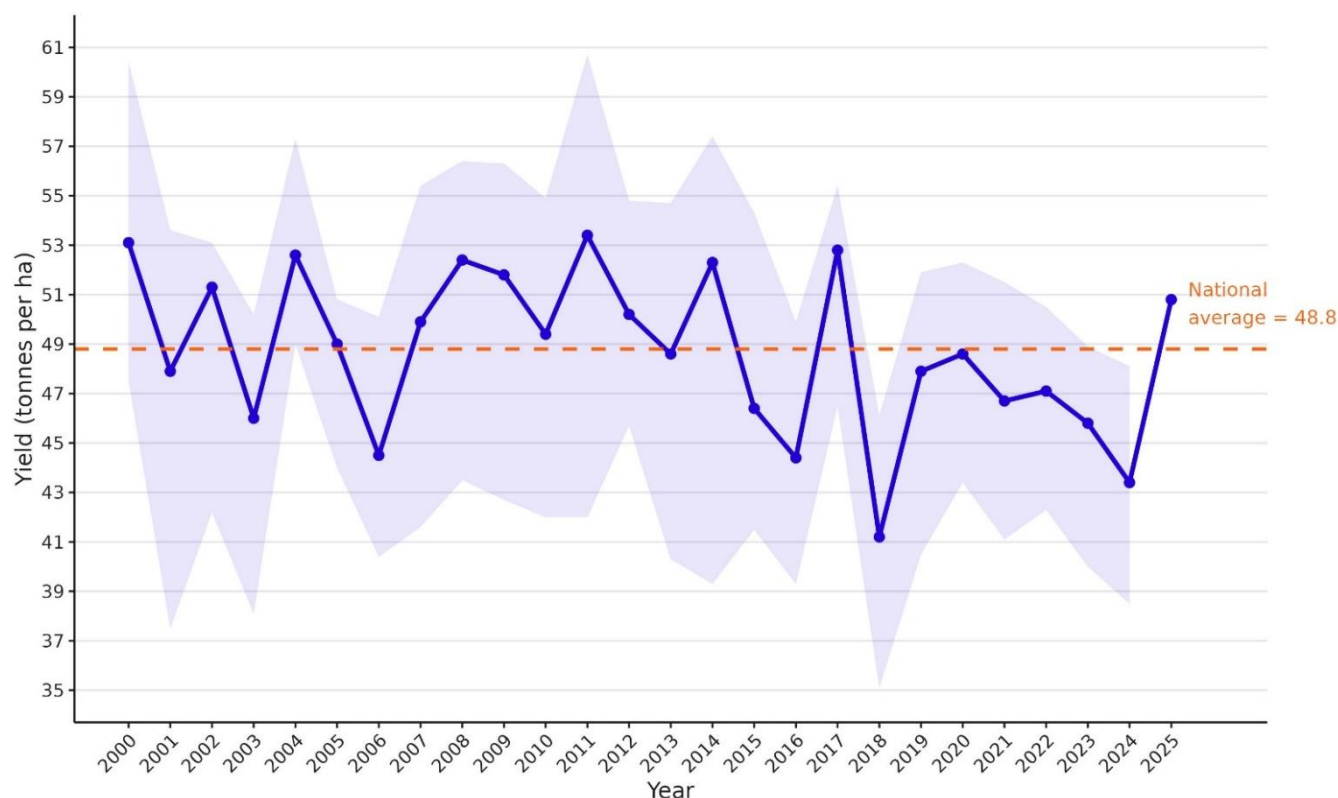
Potato production for processing is particularly exposed to weather variability because yields and quality depend heavily on growing-season conditions. Both drought and excess rainfall can disrupt planting, tuber bulking and harvest. Climate change is making these extremes more frequent and more variable, increasing the likelihood of production shocks that affect both volume and quality.

Climate-driven production shocks are becoming more frequent

Recent growing seasons show how climate-related stresses translate into yield volatility. In the Netherlands, national potato yields between 2000 and 2025 fluctuate around a long-term average of 48.8 t/ha⁻¹ (Figure 2), but the pattern has shifted over time. Yields frequently met or exceeded this benchmark until the mid-2010s. Since then, sub-average outcomes have occurred more often, signaling growing climate pressure on production stability.

¹ In this report, resilience refers to the ability of the value chain to prepare for shocks, absorb disruption, recover from impacts and adapt to changing conditions over time.

Figure 2: Annual potato yield in the Netherlands (2000-2025)



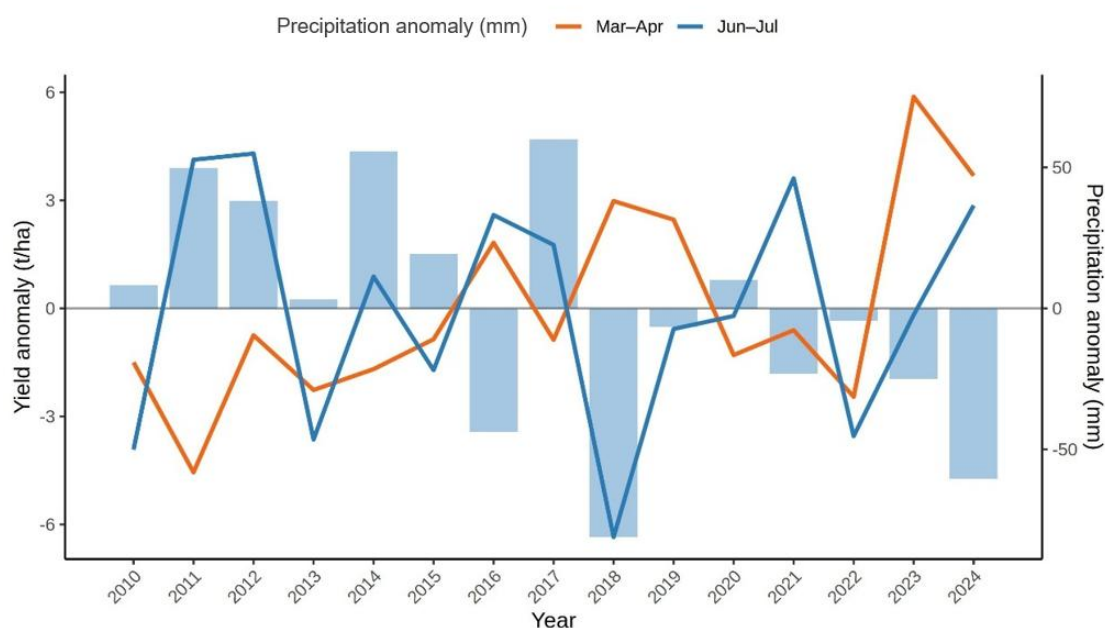
Note: The purple shaded area represents the range of yields (minimum to maximum) observed across provinces for each year shown in the plot.

Source: CBS, RaboResearch 2026

These yield deviations closely align with seasonal climate anomalies. Exceptionally wet springs reduced planting opportunities and raised disease pressure in years such as 2016 and 2023, when March-April precipitation was roughly 26% and 85% above average. In contrast, 2018 represents a compound shock: a very wet spring (+43%) followed by an exceptionally dry summer, with June-July precipitation around 53% below normal. All three years correspond to clear negative yield deviations, with national averages falling to approximately 46 t/ha⁻¹ in 2016, 41 t/ha⁻¹ in 2018, and 43 t/ha⁻¹ in 2023.

[Field-level evidence](#) confirms that extreme weather explains much of the year-to-year yield variability. High-intensity rainfall has been associated with yield losses of up to 36%, while drought typically reduces yields by 13-25%, depending on severity. Analysis linking yield anomalies to seasonal climate patterns (Figure 3) shows that shortages are most strongly associated with dry conditions during June-July, when tuber bulking is most sensitive to water stress. Excess rainfall in March-April also depresses yields by delaying planting, restricting early root development and increasing disease risks. The largest losses occur when wet early-season conditions are followed by summer drought, highlighting how compound stresses within a single growing season amplify production risk.

Figure 3: Relationship between seasonal climate conditions and potato yield anomalies in the Netherlands

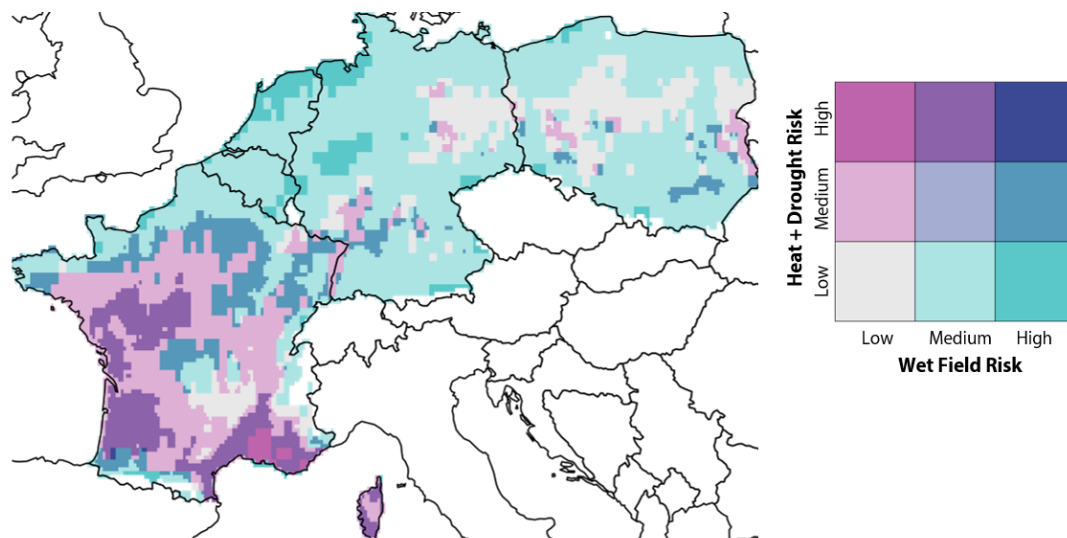


Source: CBS, Worldclim, RaboResearch 2026

Looking ahead, [KNMI'23 climate scenarios](#) suggest that Dutch production risks are likely to intensify. Scenarios point to stronger seasonal contrasts, with wetter winters and springs increasingly combined with drier summers. Across scenarios, the share of years affected by either drought or high-intensity rainfall rises from about 37% today to roughly 45%-50% under high-emissions pathways. This implies a higher likelihood of damaging conditions occurring within the same growing season, even if average annual precipitation remains relatively stable.

At the Northwest European scale, agroclimatic indicators show that these risks are not distributed evenly across the region (Figure 4). Wet-related risks dominate in the Netherlands, Belgium and large parts of Germany, while drought- and heat-related stress is more prominent in French production regions. Together, these patterns show that climate-driven production shocks are becoming more frequent and increasingly heterogeneous across Northwest Europe.

Figure 4: Spatial distribution of agroclimatic risk for main European potato-producing countries



Source: Copernicus, Schaap et al., 2011, RaboResearch 2026

Climate change is increasing pest and disease pressure

Climate change affects potato production not only through direct weather shocks, but also through biological pressure. Warmer temperatures, milder winters and more variable rainfall can make pest and disease outbreaks more frequent and faster-moving, while also raising the likelihood of simultaneous regional impacts. This creates a second climate-related risk channel, increasing crop-management costs, systemic risk and yield volatility.

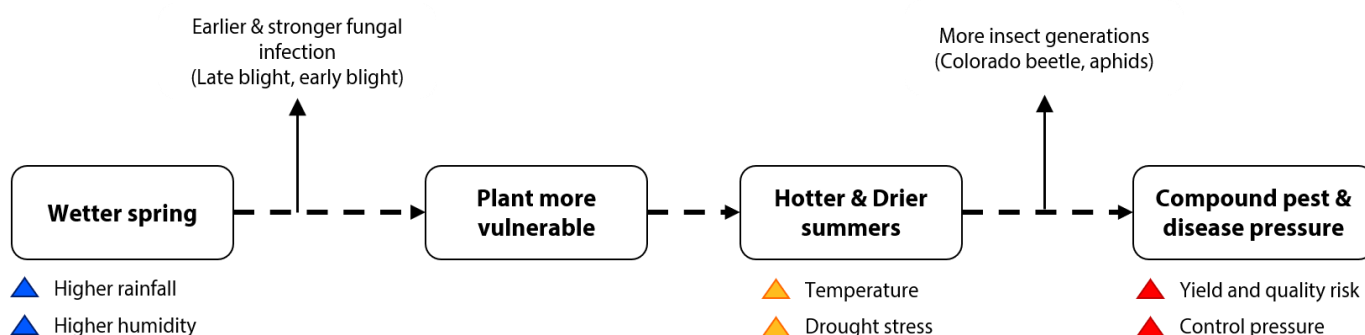
Fungal diseases are a major concern. Late blight (*Phytophthora infestans*) thrives under sustained leaf wetness and mild temperatures – conditions increasingly linked to wetter springs and heavy rainfall. Early-season infections are particularly damaging, as canopy loss occurs during crop establishment and early bulking. [EuroBlight data show](#) that, without effective control, late blight can cause average yield losses of around 40%. Control is becoming more difficult, with multi-virulent strains reported in about 15% of countries and fungicide-resistant strains rising [from under 10% to around 30%](#) between 2022 and 2023.

Early blight (*Alternaria*) further adds to risk, causing [average starch yield losses of 10-15% and over 30%](#) in severe years. Higher temperatures and longer growing seasons promote earlier infection and faster disease development, increasing stress during critical growth stages.

Insect pest pressure is also rising. Warmer conditions allow pests such as the [Colorado potato beetle](#) to develop faster, produce additional generations and survive winters more successfully. Climate projections indicate a northward expansion of suitable habitat across major potato-growing regions, increasing the risk of concurrent infestations. Even small increases in generation numbers can sharply raise damage levels due to rapid population growth and faster resistance development.

In addition to yield losses, climate change can increase post-harvest storage losses, as quality defects and disease symptoms often emerge only during storage. These losses are particularly costly given the high expenses associated with potato storage.

Figure 5: Potential impacts of climate change on pest and disease dynamics



Source: RaboResearch 2026

Nitrate policies create transition pressure for growers

Policies to reduce nitrate pollution across countries such as Belgium, the Netherlands, Germany and France impose tighter constraints on arable farming, including stricter limits on nitrogen application, crop rotation rules and cover-crop obligations. While designed to curb nitrogen surpluses, these measures directly influence management choices and risk exposure for potato producers.

Evidence suggests that yield impacts are mixed. In intensive northwestern European systems, nitrogen inputs often exceed crop requirements, leaving limited scope for yield gains from additional fertilization. Farm data and modelling studies show that nitrogen surpluses – especially on clay soils – can be reduced to meet environmental thresholds without yield loss if inputs are better aligned with crop demand. However, this outcome is not automatic. Yield-neutral nitrogen reduction depends on improved monitoring, timing and targeting of applications, and clearer yield planning.

Adapting to these practices involves adjustment costs and learning effects, which can temporarily increase yield variability. As a result, while nitrate-reduction policies need not lower long-term potato yields in northwestern Europe, they can create short-term transitional pressures if not accompanied by adequate advisory support.

Industry and market risks are more manageable but evolving

Northwestern Europe hosts a highly developed, export-oriented potato-processing industry. Belgium and the Netherlands are the world’s leading exporters of frozen potato products, surpassing countries with much larger agricultural land bases, such as Canada and the US. Around half of exports go to other EU countries and about 15% to the UK. The remainder goes to non-EU markets, including Saudi Arabia, the US and Brazil.

Demand is driven by structural factors such as population and income growth, changing consumer preferences, the expansion of fast-food outlets, greater household freezer capacity and tourism. Supported by these trends, global demand for frozen potato products is expected to grow by [around 3% per year](#) (in volume terms).

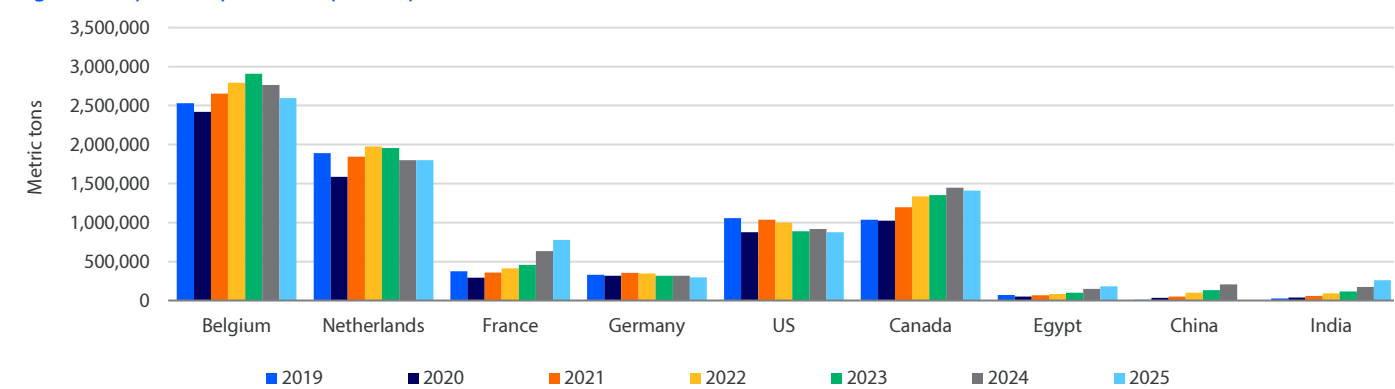
The Middle East: region of opportunity

[Higher female labor-force participation](#) is associated with stronger demand for time-saving foods, including prepared meals and frozen products. The [Middle East offers substantial headroom](#): female participation averages 24.6%, about half the global level, with wide variation (Kuwait 24.1%, Jordan ~17–19%, Saudi Arabia ~35%, UAE ~23%, Qatar ~18%). Women’s employment is expected to grow 2-2.5× by 2030, driven by services growth, digitization and labor-market reforms. Saudi Arabia illustrates the pace of change, with participation rising from ~18% in 2016 to over 35% in 2023, supporting long-term demand for convenient frozen foods, including frozen potato products.

The global competitiveness of the EU potato industry is under pressure

Exports of frozen potato products from the EU4 (Belgium, the Netherlands, France and Germany) have increased in recent years. After rising from 5.1 million metric tons in 2021 to 5.6 million metric tons in 2023, export growth began to lose momentum. While France continued to expand exports (driven by processing capacity expansion), volumes from Belgium, the Netherlands and Germany either stabilized or declined (Figure 6). In contrast, export growth continued in other regions, with countries such as India and Egypt expanding exports throughout 2024 and 2025.

Figure 6: Exports of processed potato products (HS-code 200410)



Note: China 2025 data unavailable; France (2023, 2025) and India (2025) figures are estimated
Source: UN Comtrade 2026

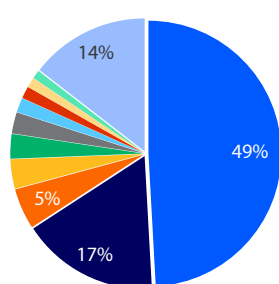
Although these emerging exporters still account for much lower volumes than the EU4, sustained growth suggests they are becoming more important competitors in non-EU markets. This is a real and immediate challenge for potato processors in

Europe. They are responding by lowering prices of exported processed potato products, temporarily shutting down production lines, putting capacity expansion plans on hold and, in some cases, permanently closing processing facilities. This should support overall operational efficiency of the EU's potato processing industry, which is crucial for EU frozen potato exporters, particularly given the region's relatively high [labor](#) and [energy costs](#).

Potato sector depends on exports, but diversification of markets limits exposure to trade disruptions

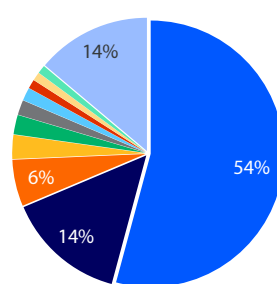
The EU potato sector is highly export-oriented, with 35-40% of processed potato exports from Belgium and the Netherlands destined for non-EU markets beyond the UK. These exports of processed potato products may be affected by external restrictions. These include trade barriers, such as US tariffs on EU products, as well as disruptions such as the Middle East conflict. Both can adversely impact exports of frozen potato products. However, as no single non-EU or UK market accounts for more than 6% of total export volumes (figures 5 and 6), overall vulnerability to such shocks remains relatively limited.

Figure 7: Share of top 10 export partners Belgium for frozen potato products (2025)



■ EU ■ UK ■ Saudi Arabia ■ Brazil
 ■ Australia ■ US ■ Japan ■ UAE
 ■ Kuwait ■ Chile ■ Other

Figure 8: Share of top 10 export partners the Netherlands for frozen potato products (2025)



■ EU ■ UK ■ US ■ Brazil
 ■ Saudi Arabia ■ Chile ■ Mexico ■ Colombia
 ■ Japan ■ Australia ■ Other

Source: UN Comtrade 2026

Source: UN Comtrade 2026

Inflation may temporarily curb French fry consumption

The [European foodservice market](#) has shown limited growth over the past 18 months. With economic growth expected to remain modest in both 2026 and 2027, foodservice traffic and consumer spending are likely to remain broadly flat in absolute terms. Inflation in Europe, the UK and the US is [projected at 2%-3.5% in 2026-27](#) (current as of 1 July), although forecasts remain sensitive to energy prices and geopolitical developments. Food inflation [is likely to be higher](#), but will not reach the peak of 2023. This indicates a moderately elevated inflation rate rather than significant inflationary pressure.

Inflationary and economic shocks could disrupt this baseline outlook. While food and beverage demand is relatively inelastic, out-of-home food consumption is [more sensitive](#) to changes in consumer spending. This creates a potential vulnerability for the processed potato sector, as French fries are primarily consumed through foodservice channels. However, the sector benefits from its strong exposure to quick-service restaurants, which tend to be more resilient during economic downturns due to their affordability and convenience.

As a result, economic shocks may temporarily affect demand, but their impact on overall French fry consumption is likely to be limited and should not be overstated.

Impact of GLP-1 on the EU potato industry appears manageable

Consumption of French fries may face downside risks as preferences shift towards healthier lifestyles. A key factor is the rapid uptake of [GLP-1 medications](#), initially developed for diabetes and now widely used for weight management. These drugs reduce appetite and slow digestion.

Adoption is most advanced in the US, where nearly 12% of adults have used a GLP-1 for weight loss. Uptake is accelerating in the UK, where adoption rates are estimated at 4-7%, while continental Europe remains lower at close to 2%. Further growth is expected, driven by obesity rates, falling prices as patents expire, reimbursement policies and the availability of oral alternatives.

GLP-1 use is associated with reduced spending on high-calorie, high-sugar, and high-fat categories. For potato products, [survey-based evidence](#) shows spending declines of 10% for chips and savory snacks and 6% for sides and frozen side dishes within the first six months of adoption. However, further research is needed to better understand and quantify the impact on specific food categories.

For the European potato sector, the impact of GLP-1 appears manageable. Assuming a 5% adoption rate in Europe and the UK, and a 10% reduction in fries spending by users, the estimated impact would be about -0.5%.

Cyber attacks can disrupt individual companies, but sector-wide risk is limited

The growing number of cybersecurity threats increasingly affects the food and agriculture sector, including the potato value chain. Examples include a [Dutch potato breeder](#) falling victim to phishing and financial fraud, a [US potato processor](#) hit by ransomware, and a [UK retailer](#) suffering a cyberattack that resulted in EUR 240 million in lost sales. Companies are becoming increasingly aware of cyber risks, particularly ransomware attacks, as these can shut down operations and severely disrupt short-term business continuity. Cyber attacks can have severe consequences for individual companies, but the overall vulnerability of the Northwestern European sector remains limited.

Farm input risks are mainly about affordability, not availability

Input price shocks are a real but manageable risk for farmers

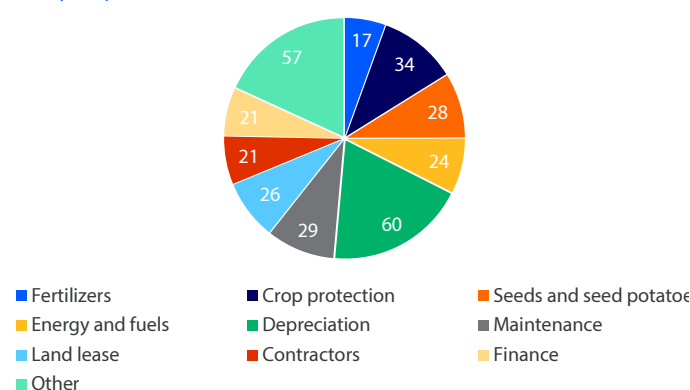
Agricultural inputs, including fertilizers, crop protection products, fuel and energy are largely imported, with important supplies originating from regions such as Russia (fertilizers), China (crop protection) and the Middle East (energy and fuels). This creates exposure to geopolitical events which can trigger availability risks and price shocks. Nevertheless, supply availability risks remain relatively limited for the EU, as alternative sourcing options exist for most inputs.

Crop protection may be an exception, as [China remains the dominant producer](#) of active ingredients for crop protection products. Although India is emerging as a credible alternative, it is not yet able to replicate China's full capabilities across the crop protection value chain in the short term – from base petrochemicals and intermediates to active ingredients and final formulations.

Overall, the main risks facing the EU agricultural sector relate to affordability and price volatility rather than physical shortages, with crop protection representing the area of greatest supply concentration and vulnerability.

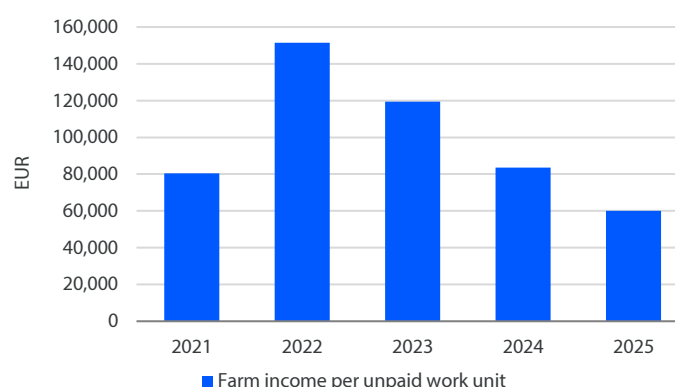
Using Dutch arable farms with a strong reliance on potato production as a benchmark, farm inputs and energy account for approximately 35% of total costs (Figure 7). Depreciation is the largest cost category. Maintenance and land lease payments are also substantial. Despite the importance of the different inputs as a cost component, even a doubling of crop protection costs would leave Dutch potato farms profitable. As a result, temporary spikes in input and energy prices are likely to reduce profitability but are unlikely to be catastrophic. Sustained increases, however, could exert significant pressure on farm incomes and weaken the sector's long-term profitability. Such a scenario appears unlikely at present.

Figure 9: Average costs structure Dutch arable farmer 2021-2025 (EUR 1,000)



Source: Agrimatie/WUR 2026

Figure 10: Average Dutch arable farm income per unpaid work unit



Source: Agrimatie/WUR 2026

For Dutch potato processors, energy costs represent around 4% of total production costs, compared with approximately 2% for the broader food-processing industry (CBS, 2023). This relatively high energy intensity makes the potato-processing sector more exposed to energy price shocks than much of the wider food industry. Companies often manage this risk through long-term contracts.

Resilience requires coordinated action across the value chain

Overall, the Northwest European processed potato value chain faces a medium but rising risk profile. The most material vulnerabilities originate upstream at farms, where climate-driven yield volatility, pest and disease pressure, and tightening environmental regulation can reduce supply and quality. These risks are amplified by the sector's geographic concentration, synchronized production calendars and reliance on a relatively narrow growing region. By contrast, downstream demand and market risks appear more manageable. Export markets are diversified, inflation is expected to be elevated but manageable, and the potential demand impact from GLP-1 adoption appears limited at current European uptake levels. Competitive pressure from emerging exporters, however, is structural and requires continued attention from processors.

Table 1: Assessment potential vulnerabilities

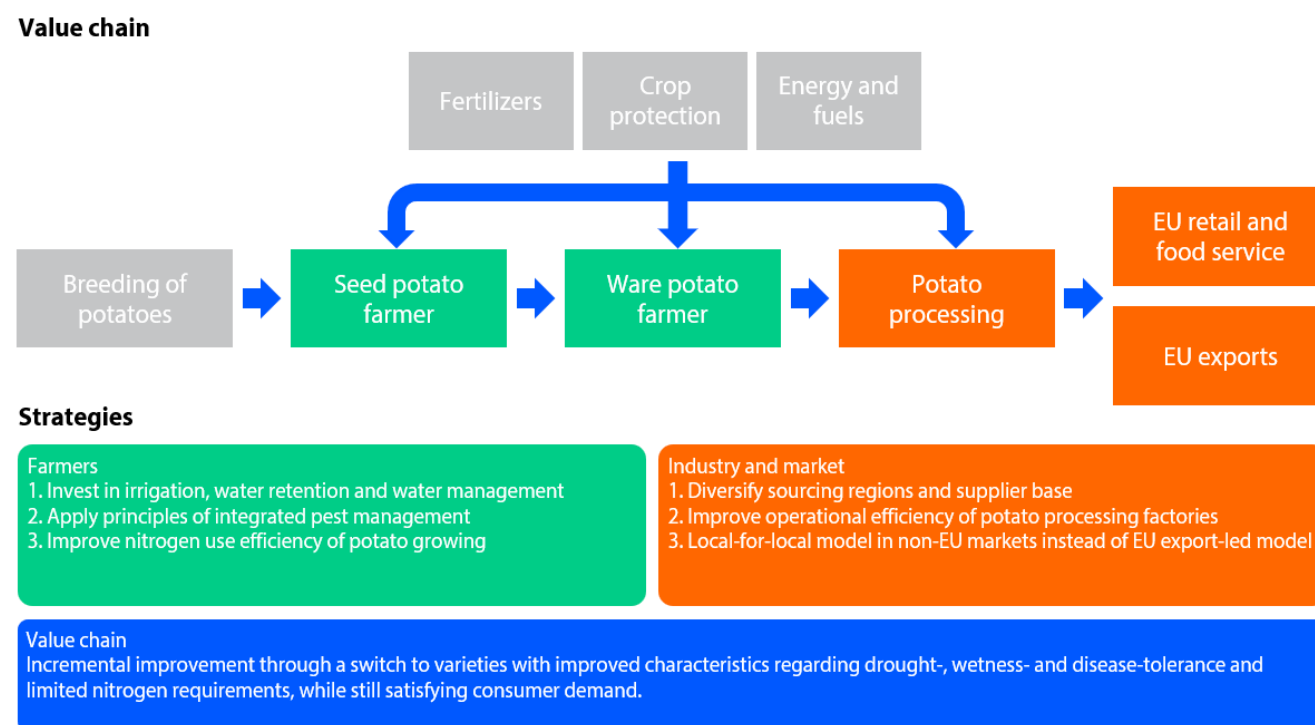
Vulnerabilities	Type	Probability	Impact on sector
Farmers			
1. Climate events	Shock	■ ■ ■ ■ ■	■ ■ ■ ■ ■
2. Pest and diseases	Shock	■ ■ ■ ■ ■	■ ■ ■ ■ ■
3. Restrictions chemical crop protection	Stress	■ ■ ■ ■ ■	■ ■ ■ ■ ■
4. Tighter nitrates regulations	Stress	■ ■ ■ ■ ■	■ ■ ■ ■ ■
Industry and market			
5. Pressure EU export competitiveness	Stress	■ ■ ■ ■ ■	■ ■ ■ ■ ■
6. Trade barriers	Shock	■ ■ ■ ■ ■	■ ■ ■ ■ ■
7. GLP-1	Stress	■ ■ ■ ■ ■	■ ■ ■ ■ ■
8. Inflation shock	Shock	■ ■ ■ ■ ■	■ ■ ■ ■ ■
9. Cyber attacks	Shock	■ ■ ■ ■ ■	■ ■ ■ ■ ■
Inputs and energy suppliers			
10. Affordability farm inputs and energy	Shock	■ ■ ■ ■ ■	■ ■ ■ ■ ■

Source: RaboResearch 2026, based on interviews with industry experts

Adaptation to the vulnerabilities should be treated as a continuous cycle rather than a one-off response. Before a shock, actors can prepare to reduce exposure through diversification, contracting and implementing improved practices. During a shock, resilience depends on buffers, operational flexibility and rapid response. After a shock, lessons should feed into future sourcing, varieties, contracts and investment priorities.

The actions below translate this cycle into practical priorities by actor. They focus on reducing systemic exposure while preserving competitiveness, and identify where barriers remain and which actors are best placed to enable change.

Figure 11: Actions to improve value chain resilience



Source: RaboResearch 2026

Farmers can reduce their vulnerability through irrigation, integrated pest management (including biological crop protection and diversified crop rotations), and improved nitrogen-use efficiency. Processors and retailers can strengthen resilience through sourcing diversification, operational efficiency, and a stronger local-for-local approach when serving non-EU markets.

Across the value chain, breeding potato varieties with greater tolerance to drought, excess rainfall, diseases, and lower nitrogen requirements can further improve resilience. However, this remains an incremental process rather than a silver bullet. Breeding efforts must balance resilience traits with the quality characteristics demanded by consumers and foodservice operators.

Resilience must be built across the entire value chain. Farmers face many of the sector's key risks but often have the fewest financial resources, limited management capacity, and relatively little bargaining power. This creates a role for chain organisers and downstream stakeholders to support long-term investments, facilitate knowledge sharing, and develop risk-sharing mechanisms.

Potato processors face a trade-off between strengthening resilience and yield stability in existing sourcing regions, for example through irrigation and farmer support programmes, and diversifying sourcing to include other regions to reduce risk, which typically increases transport costs. The challenge is to balance cost, risk, supply security and sustainability.

The sector's ability to translate its vulnerabilities into a value chain strategy – supported by targeted actions, investments, and risk-sharing mechanisms – will determine whether Northwest Europe can maintain its position as the global benchmark for processed potato production.

Northwest Europe is not alone in facing resilience challenges. Emerging potato-producing regions that have grown rapidly in the last years, face similar challenges. Egypt, for example, faces increasing [constraints from water scarcity and soil salinity](#), while potato production in India is concentrated in the [climate-sensitive Indo-Gangetic plains of North India](#). Thanks to its long potato-producing legacy, Northwest Europe has strong technical expertise, efficient value chains and a high capacity to adapt. This in contrast with emerging producing regions with more immature value chains. As climate change, pests and diseases increasingly affect potato production worldwide, a resilient Northwest European sector could gain a valuable competitive advantage.

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