

INSIGHT REPORT

ON DENMARK AS A FOOD NATION 2023

BRAND STRENGTHS AND AWARENESS:
DRIVERS OF EXPORT TOWARDS A SUSTAINABLE TRANSITION



Solutions of tomorrow
By Denmark

Insight Report on Denmark as a Food Nation 2023

Brand strengths and awareness:
Drivers of export towards a sustainable transition
Version 1.0 2023. ISSN 2794-5588

Editor in chief

Food Nation

Editor

Cath Mersh Communications, InVirke

Contributors

Professor Polymeros Chrysochou, industry cooperation coordinator,
MAPP Centre, Aarhus University
Kristian Henningsen, director of public affairs, Carlsberg,
and Partha Jha, vice president marketing, Carlsberg India
Madison Walker, head of public affairs North America,
and André van Wageningen, head of public affairs and sustainability EU, Grodan
Anders Carøe Bylling, group vice president, Aller Aqua
Petter Aagesen, sales and marketing director, Thise Dairy

Survey and data

Epinion

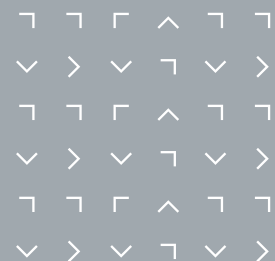
Graphics and layout

Modpol

Download and further information

Download this report and other related publications
at www.foodnationdenmark.com/toolbox/

To order copies of this report or request information about other related
publications, please contact Food Nation at foodnation@foodnationdenmark.dk



CONTENTS



FOREWORD

EXECUTIVE SUMMARY

KEY RECOMMENDATIONS AND BUSINESS OPPORTUNITIES6

ABOUT THE SURVEY9

BRAND AWARENESS

BUILDING A CONNECTION TO DENMARK'S BRAND 11

CASE: CHINA GOES DANISH WITH A STRONG FISH FEED BRAND16

CASE: FUN BRAND MAKES SENSE TO YOUNG URBAN ADULTS17

UNIQUE SELLING POINTS

CAPTURING THE POTENTIAL OF RECOGNISED STRENGTHS19

CASE: BRANDING THE DAIRY BEHIND THE ORGANIC LABEL24

CASE: PARTNERSHIP PUTS THE SPOTLIGHT ON INDOOR CROPS 25

A STRONG FOUNDATION FOR GROWTH

TOWARDS NEW EXPORT ADVENTURES WITH SOLID BRAND ASSETS

WITHIN SUSTAINABILITY 27

MARKET DEEP DIVES 33

CHINA34

GERMANY 38

INDIA42

THE UNITED STATES46

DANISH STRONGHOLDS 51

ABOUT FOOD NATION 53



FORREWO

FOREWORD

Branding Danish strongholds in an interdependent world

Global geopolitical challenges remind us of our dependence on a reliable food supply chain. The war in Ukraine, an energy and inflation crisis and a devastating pandemic have highlighted many vulnerabilities. Effects of climate changes are becoming increasingly visible around the world. At the same time, we have seen innovation accelerate to overcome challenges and disruptions to the food supply moving forward.

In Denmark, we consider ourselves strong partners for solving many of the issues that stand between us and a sustainable future. Farm-to-fork collaboration between Danish producers, academia and authorities has inspired some of the world's most advanced agricultural and food processing technology and set new standards for food safety, quality and organic foods. Danish research and technology are also enabling new methods for sustainable food production with a lower climate impact.

The question this report aims to answer is: how is Denmark perceived in key export markets? Do decision-makers recognise the Danish food cluster as a go-to source of innovative, sustainable products and solutions that meet their needs – perhaps even better than suppliers in their home markets?

This is the fifth consecutive year that Food Nation has mapped Denmark's image abroad. The purpose is to uncover insights that can support Danish export and export-ready companies in their branding efforts on chosen markets.

What our annual survey continues to reveal is that quality, food safety and sustainability remain top of the agenda for decision-makers regardless of geographic location. Concerns about the impact of climate change on global food production are a factor here. According to the World Meteorological Organization¹ there is a 66% likelihood that the average annual global temperature will exceed pre-industrial levels by 1.5°C before 2027 – a forecast that adds to the sense of urgency.

In Denmark, more than 150 agrifood-related businesses have joined the Science Based Targets Initiative (SBTi) in an effort to ensure their own emission reduction targets are consistent with a global temperature rise that does not go beyond 1.5°C.

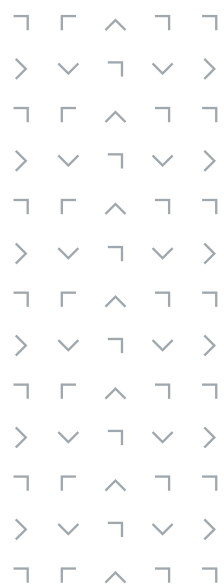
Innovation that supports efficient, carbon-neutral production and more climate-resilient crops is vital to deliver sufficient safe and nutritious food to the growing global population. Every food industry contribution in this regard is good for the planet and for business. As the expert contributors to this report confirm, brands with a sustainable image have an important role to play.

For Danish exporting and export-ready companies, the survey reveals strong growth potential in each of this year's focus markets – China, Germany, India and the US. On the following pages you can read our key findings and recommendations for strengthening branding and market strategies in each country.

Wishing you the very best of success in your export endeavours.

Lise Walbom, CEO, Food Nation

¹ World Meteorological Organization, 17 May 2023



EXECUTIVE SUMMARY

The annual insight report from Food Nation provides a snapshot of how key export markets perceive Denmark as a food and agriculture nation. Food Nation collaborates with Epinion to conduct a quantitative survey that investigates awareness of the Danish food and agriculture sector and its unique selling points. The survey findings provide the basis for the report.

This year, the survey reached out to business-to-business decision-makers in China, Germany, India and the US. The market deep dives in this report present key findings and business opportunities for Danish exporting and export-ready companies in each of the four countries.

As the survey has now run for five consecutive years, the report further explores how perceptions of Danish strongholds have developed over time, including the link with market-specific needs and values.

Shared values are key to raising awareness

Of the 20 countries that decision-makers mention in this year's survey as top-of-mind food and agriculture nations, Denmark has a joint seventh place alongside Brazil and the Netherlands. This reveals the relatively high awareness of the Danish brand compared to other, much larger exporting countries.

There is, however, big variations in awareness levels and a potential to increase it. As expected, decision-makers in Germany – Denmark's closest export market – are considerably more aware of Danish products and solutions than decision-makers from the other three markets surveyed. Exporting companies could benefit from highlighting the shared values and interests that connect them with export markets.

Recognised strengths give a competitive edge

Denmark is associated with many positive attributes in each of the four markets. Quality, organic, food safety, sustainability and reliable are the top five. Decision-makers also rate Denmark as a stronger performer than their domestic market for organic, animal welfare, sustainability and low environmental impact.

These findings indicate where Danish exporters have a competitive edge that can be used as an advantage in branding initiatives. To realise the potential, they must first understand the local definitions and contexts that shape these perceptions.

Long-term strengths match market interests

Over the past five years, decision-makers have consistently pointed to quality as Denmark's top attribute, with sustainability and food safety not far behind. Affordability, on the other hand, always ranks lowest.

Sustainability is seen to be gaining importance in surveyed markets, along with documented food safety and solutions that support health. In their branding campaigns, exporters would do well to build on the positive perceptions of Denmark's performance in all these areas.



Key recommendations & business opportunities

This report contains a series of recommendations and business opportunities for Danish export and export-ready companies. All highlight the potential to strengthen exports from the food and agriculture sector by building awareness of Denmark as a food and agriculture nation. They are summarised below:

> Drive awareness of Denmark as a food nation

Leverage Denmark as a frontrunner in relation to the following strongholds: organic, animal welfare, low environmental impact, sustainability and food safety. Denmark has a long track record for good performance in these areas.

> Focus on entry points – differentiation is secondary

Highlight the specific attributes that make a product or solution relevant to export customers. These are the entry points that make market penetration possible. Brand differentiation can begin once these key entry points are established.

> Keep refreshing memories – set an agenda

Maintain a continuous flow of branding communication to stay top of mind. Collaboration with a like-minded local partner or community initiative can provide a platform for new conversations that draw more attention to export brands.

> Understand local definitions and expectations

Research each market to uncover local perceptions of 'high quality' or 'sustainable'. Such intelligence is key to adapting brand strategies to market expectations and challenges.

> Evaluate risks before market launch

Remember to consider brand weaknesses and threats. Negative perceptions of a product category or a change in local legislation can stop an export campaign in its tracks before it gets started. A comprehensive risk assessment is a bonus for every branding strategy.





ABOUT

ABOUT THE SURVEY



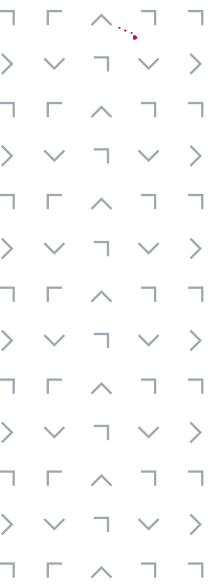
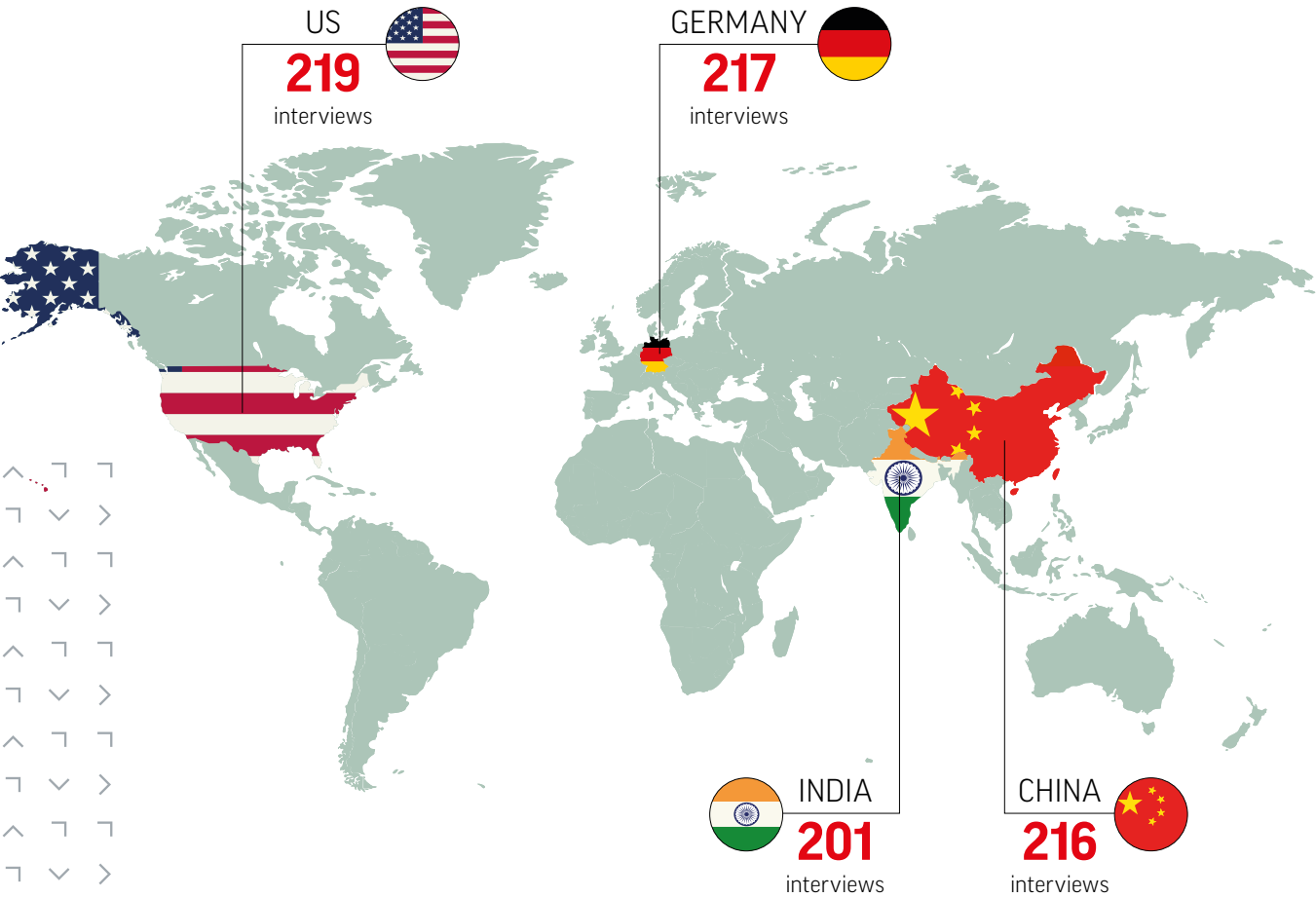
The insight report on Denmark as a food nation 2023 is based on a quantitative survey of business-to-business decision-makers in China, Germany, India and the US. Epinion conducted the survey for Food Nation in January and February 2023.

The survey examined Denmark's image as a food nation among a representative group of decision-makers working with food and agricultural products and solutions in the four markets. A total of 853 decision-makers participated.

The survey has two overall aims:

- To provide and present knowledge that will facilitate export and inspire the development of new products and solutions
- To provide the foundation for strengthening Denmark's position among international trading partners

This year's report further includes an analysis of the strengths and weaknesses of the Danish food and agriculture sector over time.





BRAND

BRAND AWARENESS

Building a connection to Denmark's brand

Exports from the Danish food sector hit a new record in 2022². Following a year of global uncertainty, rising price levels were an undeniable factor in this achievement. Nevertheless, total exports also revealed growth in volume sales – evidence that Denmark as a food and agriculture nation continues to gain ground on international markets.

The findings of this year's Food Nation survey provide fresh insights into how Denmark is perceived by decision-makers in four of these export markets – China, Germany, India and the US – and the potential to grow future exports by raising awareness of the Danish brand.

Denmark has clearly built a brand that can compete on awareness with many, much larger exporting nations. Yet, a closer look at the findings shows a big variation in awareness levels at country level. Among decision-makers from neighbouring Germany, top-of-mind awareness is 26%, making Denmark the third most recognised food nation there. In China, on the other hand, only 2% of decision-makers have Denmark top of mind, while in India and the US, the awareness level is 7% and 8% respectively.

² Landbrug & Fødevarer, 31 March 2023

How top-of-mind is Denmark?

Decision-makers were asked to list the countries that spontaneously came to mind as established producers of food and agricultural products and solutions. Their answers revealed that 11% of decision-makers across the four markets are aware of Denmark as a food nation (figure 1). This puts Denmark in joint seventh place alongside Brazil and the Netherlands, and slightly ahead of Mexico and Indonesia. From a regional perspective, Denmark stands out as the only Scandinavian country in the top 20.

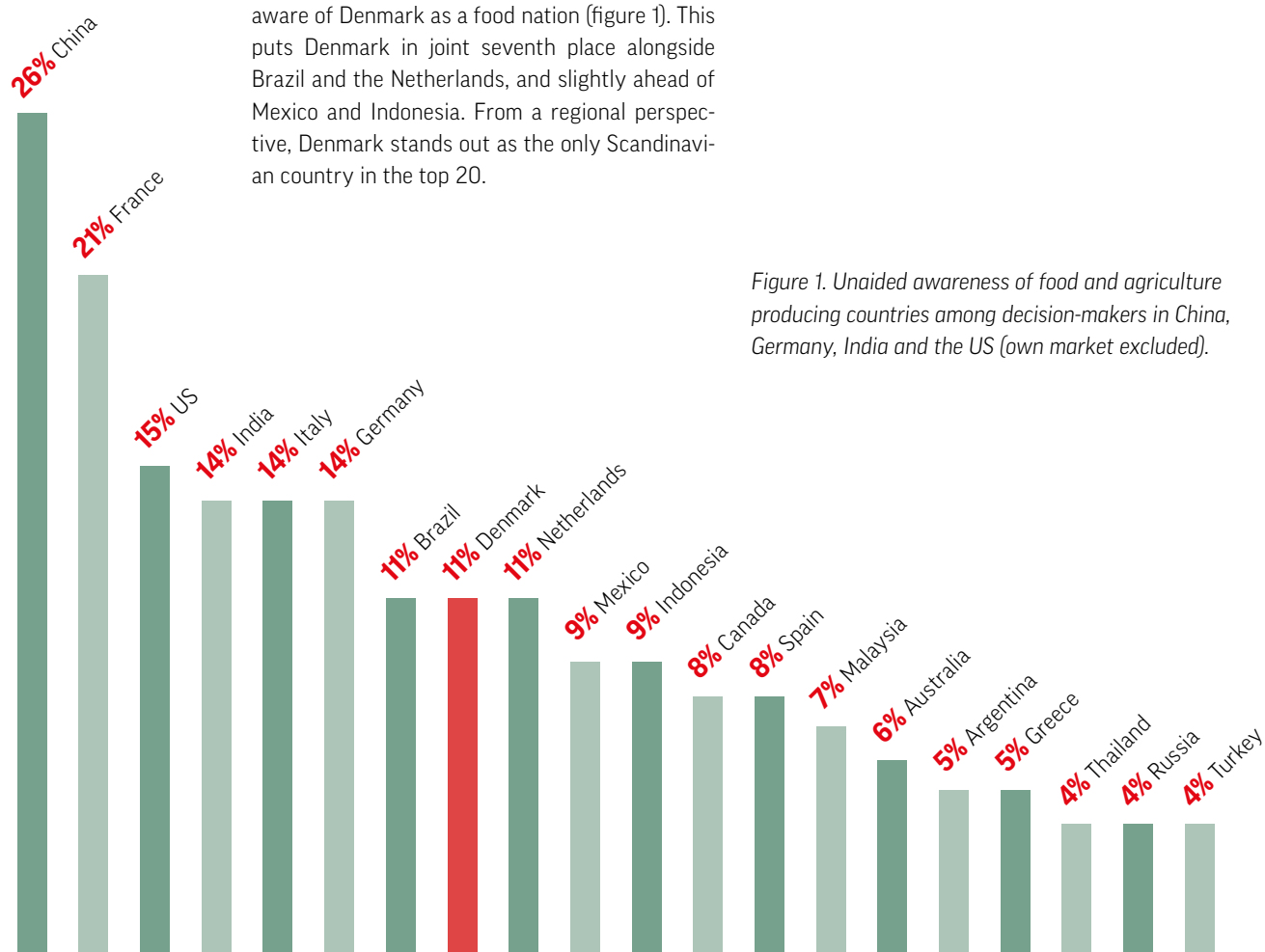


Figure 1. Unaided awareness of food and agriculture producing countries among decision-makers in China, Germany, India and the US (own market excluded).

Figure 2. Attitudes towards the Danish food and agriculture industry by market (% agree or strongly agree).

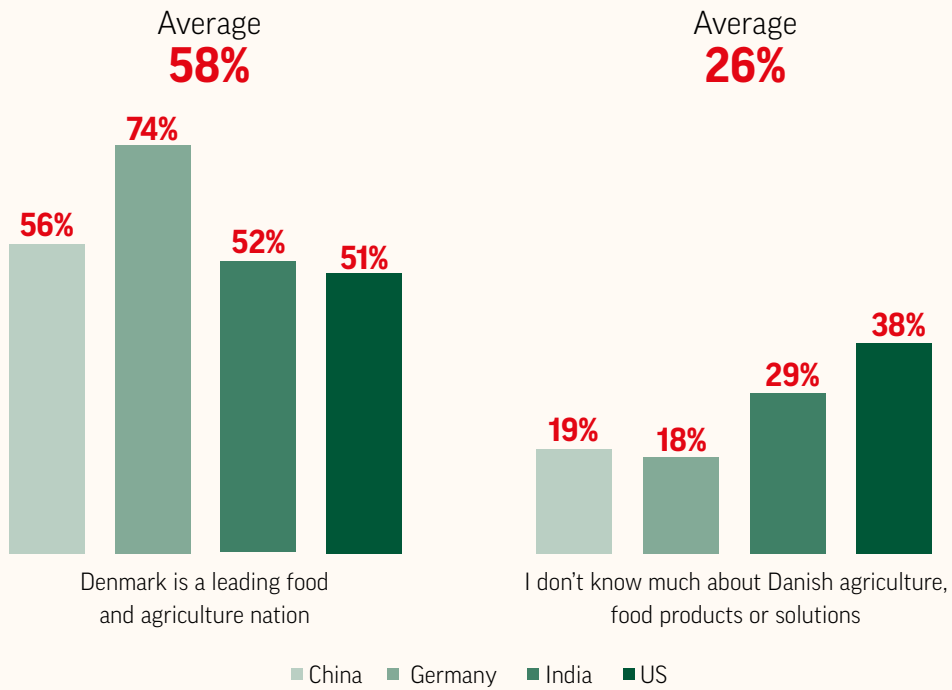
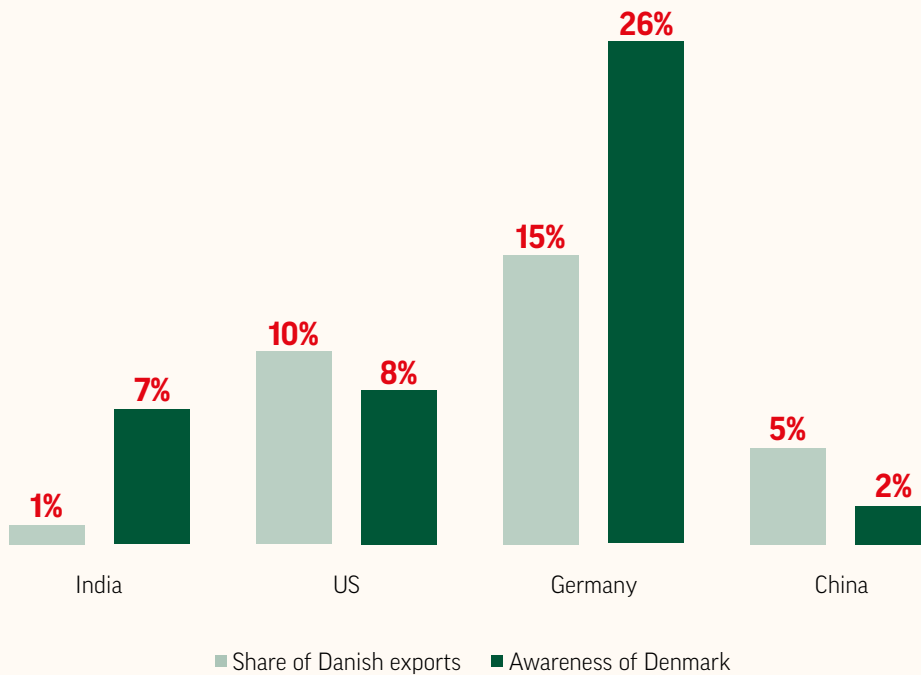


Figure 3. Awareness of Denmark versus share of Danish food and agricultural exports. Total share of decision-makers that mention Denmark as a top-of-mind nation (own market excluded) versus the total share of exports. (Statistics Denmark, 2022)



How well is Denmark known?

When asked to reflect on Denmark in particular, nearly six in 10 decision-makers agreed that Denmark is a leading food and agriculture nation (figure 2). Again, the 74% of German decision-makers who responded positively to this question have driven up the average score. In China, India and the US, the respective agreement level was a much lower 56%, 52% and 51%.

The number of decision-makers with little knowledge of Danish food and agricultural products and solutions follows a similar pattern – German and Chinese decision-makers have most knowledge, while decision-makers in India and, especially, the US know least.

A point worth noting here is that, while only 2% of Chinese decision-makers have Denmark top of mind, they still know more about Danish products and solutions than decision-makers from the US, where Denmark is top of mind for 8%. As the four surveyed markets all rank among the world's top five largest economies³, there is likely to be considerable regional variation in such awareness and knowledge levels within each country – although the survey did not address this.

Kristian Henningsen, director of public affairs at Carlsberg points to the potential in growing awareness through collaboration between companies and Danish representatives around the world.

“When we do export promotions together, we can punch above our weight. They are the face of Denmark to the outside world. Our embassies play a very important role here.”

Kristian Henningsen, director of public affairs at Carlsberg.

“If there is a good connection with the country's image and values, small brands may benefit from using Denmark's brand equity to target export markets. Bigger brands are simply bought more frequently. The key is being top of mind.”

Professor Polymeros Chrysochou, industry cooperation coordinator, MAPP Centre, Aarhus University

How can exporters raise awareness?

Commenting on these findings, Professor Polymeros Chrysochou, industry cooperation coordinator at Aarhus University's MAPP Centre recognises good potential to improve international awareness of Denmark as a food and agriculture nation. The strength of a national brand in a specific market, he says, may be critical for a new exporter with no existing brand equity of their own.

According to the most recent export statistics available from the World Integrated Trade Solution (WITS)⁴, there is a good correlation between the countries that are top of mind for decision-makers in Germany, India and the US and the countries that export most food products to their markets. Chinese decision-makers, on the other hand, tend to be more aware of food-exporting countries that are geographically close than China's actual top partners for food imports.

From a branding perspective, this illustrates why exporting companies could gain from highlighting cultural values and interests that connect them with target markets – particularly those that are further afield. One example of a successful initiative in China is the co-branding of Danish cookie brand Kjeldsens with Hans Christian Andersen, the renowned Danish author whose fairy tales are highly popular among Chinese consumers. Such awareness-raising initiatives may have a decisive impact on export sales, as well as highlighting Denmark's potential as a strong partner in transitioning towards a more sustainable food and agriculture sector.

³ WorldData.info: <https://www.worlddata.info/largest-economies.php>

⁴ World Integrated Trade Solution: https://wits.worldbank.org/CountryProfile/en/Country/WLD/Year/2020/TradeFlow/Import/Partner/all/Product/16-24_FoodProd

How important is country of origin?

Decision-makers across all surveyed markets attach great importance to country of origin when sourcing food products and solutions, emphasising the value of a strong Danish brand (figure 4). Among decision-makers in the US, 97% consider country of origin important, very important or decisive, compared to 95% in Germany and 92% in China. At 80%, Indian decision-makers are somewhat less concerned in this regard.

For Professor Polymeros Chrysochou at Aarhus University, the findings are a familiar manifestation of ethnocentricity. To overcome this on target markets, he recommends Danish exporters to identify specific attributes with the power to take preferences away from country of origin and attach them to the brand. These attributes should be the focus of sustained marketing efforts, first to raise awareness and then to keep memories fresh.

“Why do people buy a global brand? Because they have fresh memories of it due to advertising. Secondly, the products are available on the shelf.”

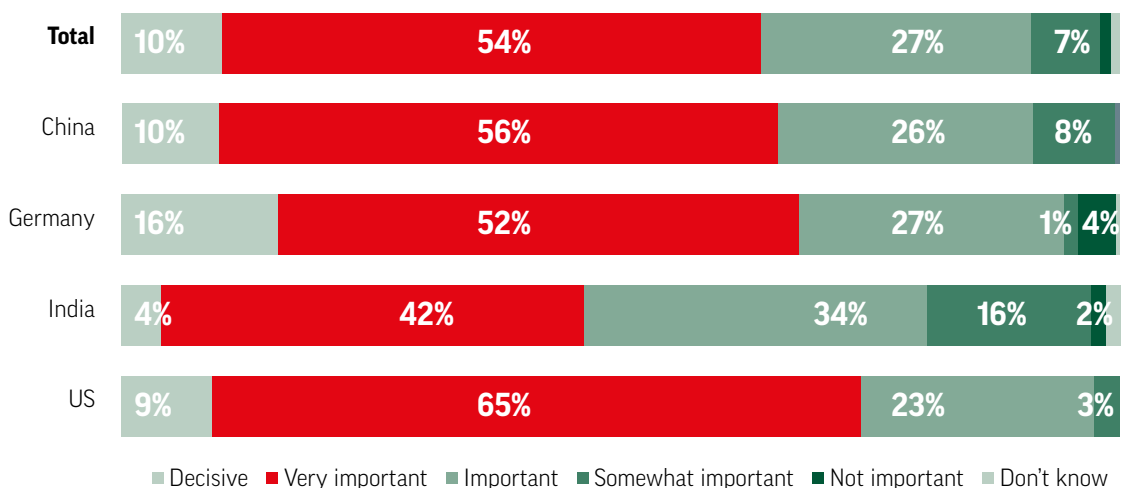
Professor Polymeros Chrysochou, industry cooperation coordinator, MAPP Centre, Aarhus University

“If you focus on differentiation, the risk is that you eliminate potential customers. Start by focusing on key entry points for importers – and then build from there.”

Professor Polymeros Chrysochou, industry cooperation coordinator, MAPP Centre, Aarhus University

A key piece of advice from Professor Chrysochou is that newcomers to an export market should not start by focusing on unique selling points that differentiate their products. The first priority, he suggests, is to determine the fundamental requirements – the entry points – for making potential customers receptive to their brand. Here, exporters should focus on entry points with the biggest potential traction – an attribute that solves a quality or food safety challenge, for example. A more niche attribute such as organic may contribute to a strong positioning in some markets, but could signal high cost on others, making it an unhelpful choice if the goal is to enter a low-price segment.

Figure 4. Importance of country of origin when choosing a supplier of food products and solutions.





Summary of recommendations for building brand awareness in export markets

➤ **Focus on entry points first**

Make sure your branding strategy highlights the category entry points that make your product or solution a relevant choice for overcoming a market challenge.

➤ **Differentiation is secondary**

Focus on points of differentiation once you are sure the key messages about entry points are understood and established.

➤ **Keep memories fresh**

Do not wait to be (re-)discovered. Maintain a continuous flow of branding communication so your products and solutions become top of mind.

CASE: ALLER AQUA

China goes Danish with a strong fish feed brand

The seafood industry is booming in Qingdao. With imports and exports worth more than USD 8 billion a year, the large seaport city is the centre for more than a third of China's fast-growing seafood trade.

That makes it the natural location for Aller Aqua. Since 2017, the Danish family-owned company has produced fish feed for the Chinese aquaculture sector at its own plant just outside Qingdao. Until then, Aller Aqua exported feed solutions from Denmark.

"Sustainable aquaculture is quite a new industry in China. So our business has always depended on our ability to persuade Chinese customers to adopt a Danish approach to production," says Anders Carøe Bylling, group vice-president and managing director of Aller Aqua (Qingdao).

Top export advice

- » *Learn to adapt your brand to the market – a local partner can help.*
- » *Highlight how Chinese customers can use your knowledge to make their products healthier.*
- » *Choose a region of China for your initial brand launch and make sure you are present to build long-term relations.*

A modern reputation

When Aller Aqua entered the market in the mid-1990s, Denmark's reputation for modern aquaculture systems that optimise productivity and save on resources was a good foundation.

Today, the company takes advantage of its local presence to share knowledge and expand its network. The China Fisheries and Seafood Expo is a particularly important date in the diary.

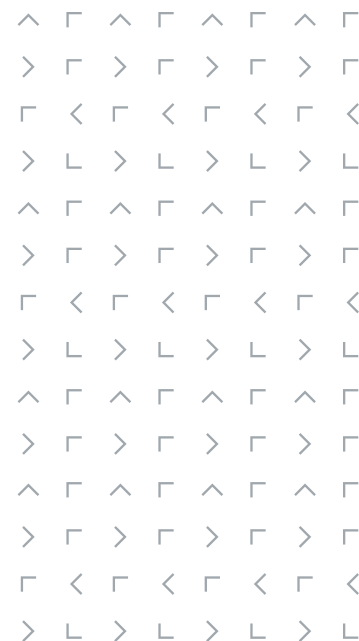
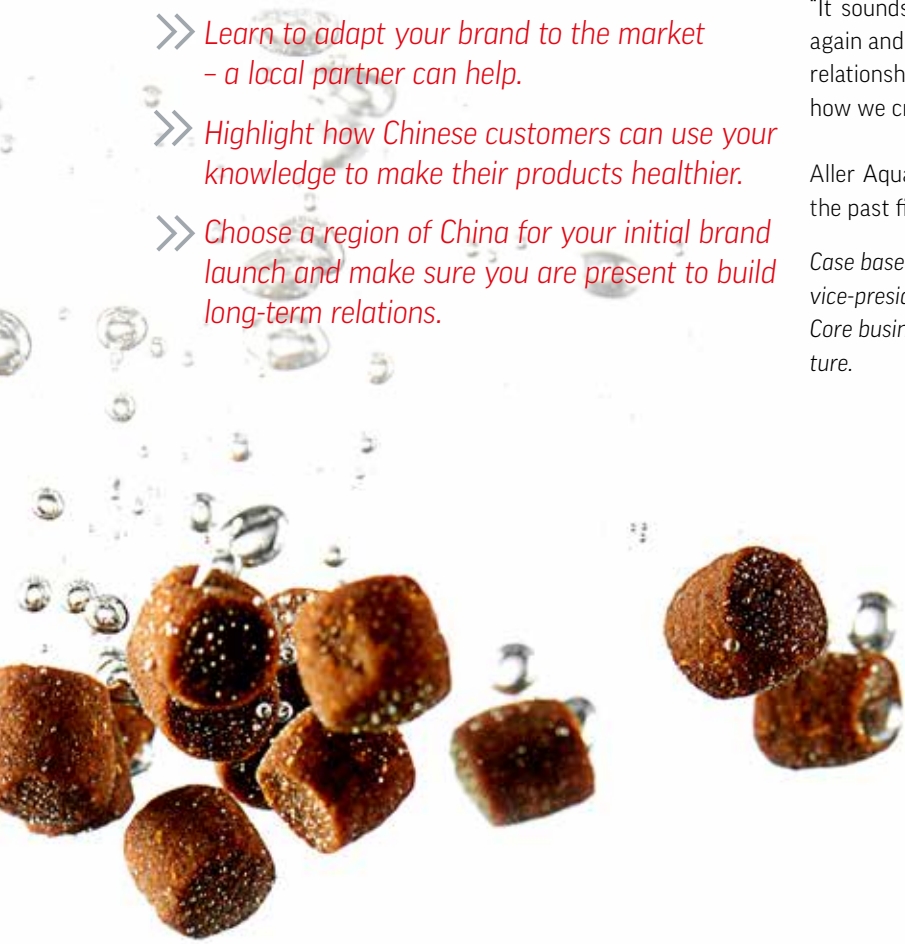
This year, Aller Aqua will host its fourth seminar at the event, one of the three biggest of its kind in the world. Up to 300 participants are expected to join the discussion about key challenges in the aquaculture sector and hear about the latest solutions from expert speakers. Each seminar has a new theme – from improving fish immunity to utilising production side streams.

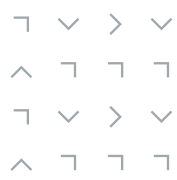
Simple but effective

"It sounds simple to hold a seminar, but we come back to it again and again. It's part of our strategy to invest in long-term relationships and build brand credibility by continuing to show how we create value," Bylling explains.

Aller Aqua has more than doubled its turnover in China over the past five years. A visible presence makes the difference.

Case based on an interview with Anders Carøe Bylling, group vice-president and managing director of Aller Aqua (Qingdao). Core business: Fish feed for freshwater and saltwater aquaculture.





CASE: CARLSBERG

Fun brand makes sense to young urban adults

Establishing a beer brand in the world's largest market for whisky takes innovative thinking. In India, the success of Carlsberg has been a lesson in the importance of addressing local preferences.

When Carlsberg first introduced its beer products to the Indian market back in 2007, the response from consumers was not as positive as hoped.

The issue soon became clear. Only one of the beers launched had the strength that Indian consumers preferred. At the same time, Denmark was largely unknown as a land of high-quality foods and beverages. So there was no advantage to be gained from linking the Carlsberg brands to Danish brewing expertise.

Targeted relaunch

The Carlsberg team tried again.

"Around 2010, we launched strong variants of the Carlsberg and Tuborg brands. That was when Tuborg Strong took off and became the biggest beer brand in the Carlsberg India portfolio," says Partha Jha, vice president marketing at Carlsberg India.

The success is the outcome of multiple initiatives. Jha mentions distinctive packaging with a ring-pull cap, competitive pricing and trading terms and a massive awareness-building campaign – not to mention the consistent high quality of the beer itself.

Top export advice

- » Define and adapt to consumer preferences in your target market.
- » Implement a multi-faceted strategy to raise awareness and build sales.
- » Establish an easily recognisable brand identity that can be developed over time.

Open for fun

"We built an 'open for fun' story around the ring-pull cap and targeted our advertising at well-educated, urban consumers in their twenties. The idea was to appeal to young people on their way to success," Jha explains.

The brand story perfectly matched the young demographic of the world's most populous nation, where more than half of India's population are under the age of 30. Over the past few years, up-and-coming Indian celebrities have become the face of the Tuborg brand.

Coming from nowhere, Tuborg is now the number two beer brand in the country. Carlsberg has since extended the range with new beer types at a range of price points – each one customised to Indian consumer tastes.

*Case based on an interview with Partha Jha, vice president marketing, Carlsberg India.
Core business: Beer.*



UNIQUE



UNIQUE SELLING POINTS

Capturing the potential of recognised strengths

Decision-makers associate Denmark with many positive attributes across the four countries in this year's survey. Such perceptions may be an advantageous starting point for Danish exporters of food and agricultural products and solutions when approaching new markets. But exporters must first understand the basis of these perceptions before they can benefit from them in their branding. Industry experts share their view on some of the findings in this chapter.

What is Denmark known for?

Quality, organic, food safety, sustainability and reliable are the five attributes that top the rankings when decision-makers are asked to list Danish strengths (figure 5). The burning question is: what lies behind these scores?

According to Professor Polymeros Chrysochou, part of the answer can be found in the other attributes that decision-makers mention. A complex generic term like quality, he points out, may encompass healthy, fresh, good taste and authentic, depending on the country. Organic is likely to be associated with sustainability, healthy, low environmental impact and natural.

“Knowledge of how each attribute is defined will give export companies an indication of where to focus when shaping a branding campaign for a specific market. A poorer perception of freshness, for example, may only be based on a market's geographical distance from Denmark. But it is an issue of concern that should be addressed through branding.

Professor Polymeros Chrysochou, industry cooperation coordinator, MAPP Centre, Aarhus University

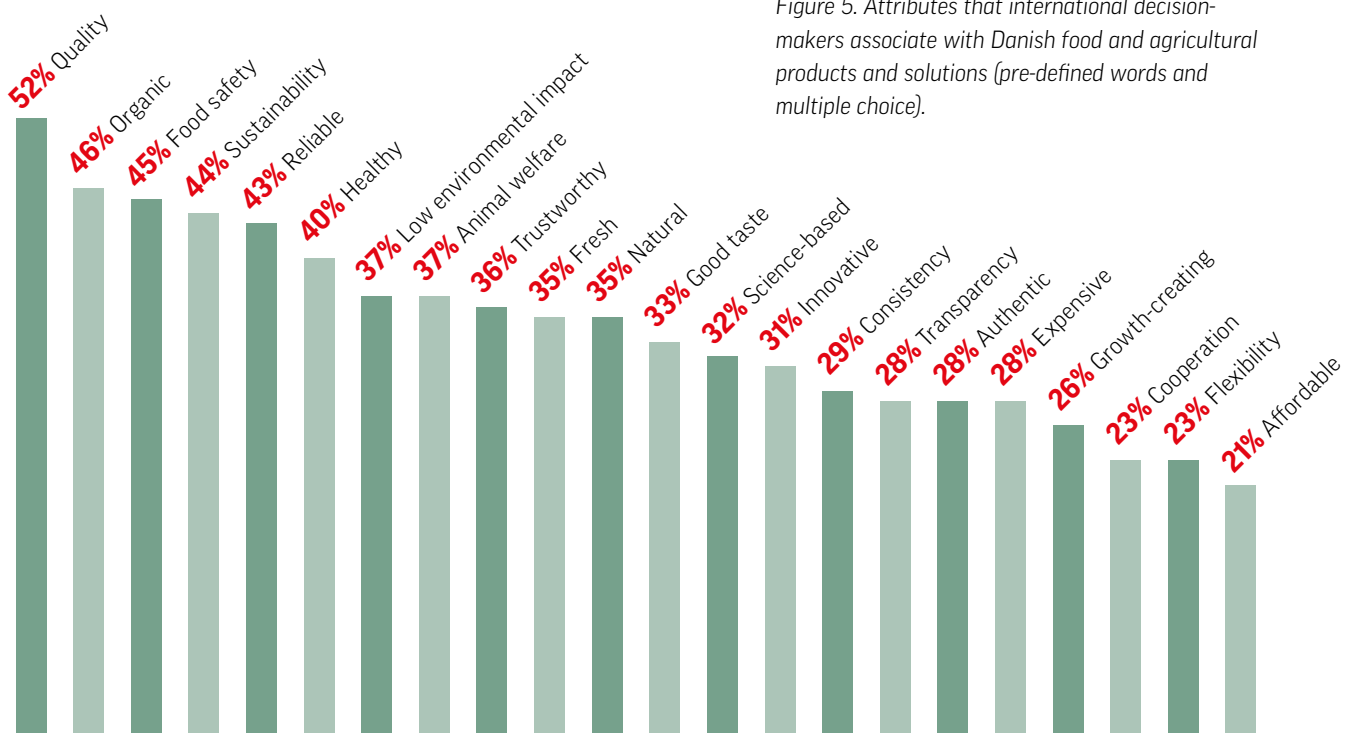


Figure 5. Attributes that international decision-makers associate with Danish food and agricultural products and solutions (pre-defined words and multiple choice).


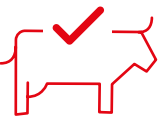


Where does Denmark do better than home markets?

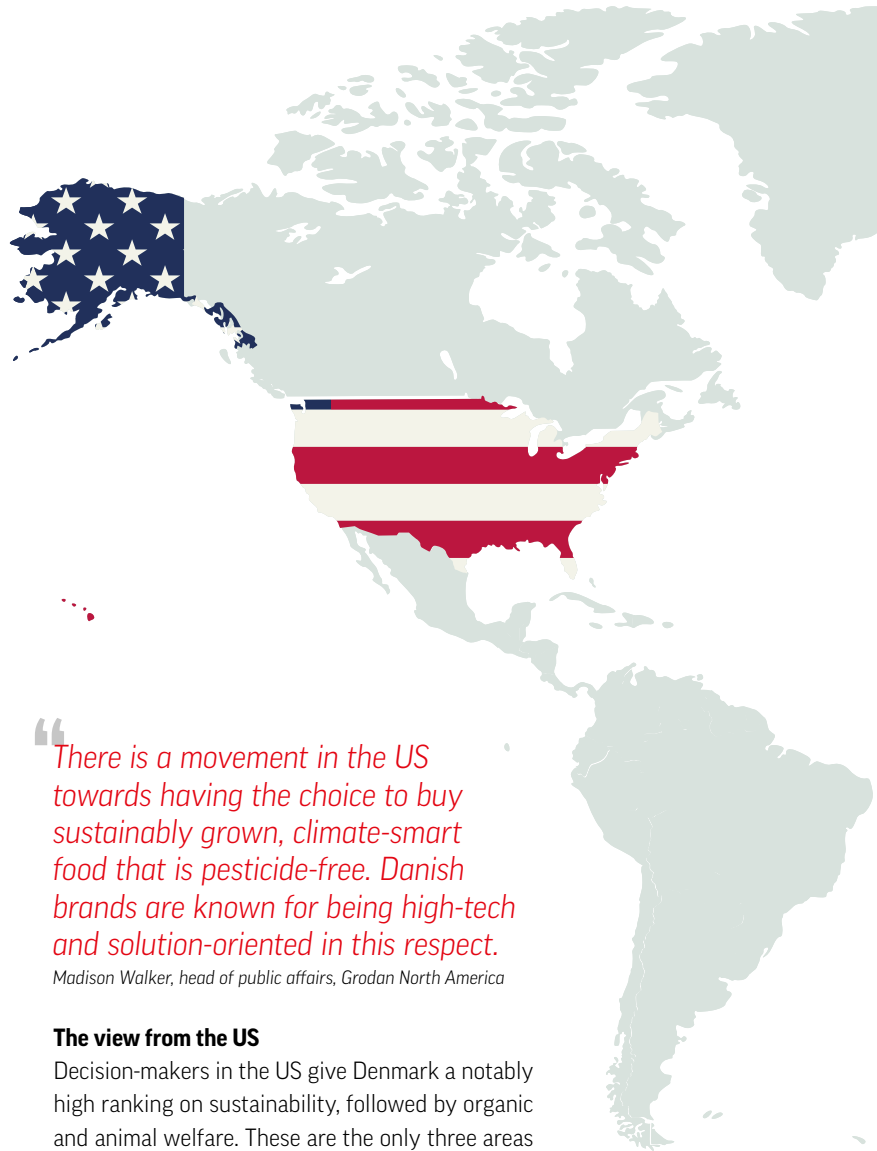
The list of positive associations with Danish food and agricultural products and solutions is encouraging. Even more interesting, perhaps, are decision-makers' perceptions of how Denmark performs on each attribute compared to home markets.

Organic, animal welfare, sustainability and low environmental impact are the top four attributes where decision-makers across the four countries see Danish exporters as stronger performers than domestic suppliers (figure 6). These are areas where Denmark is seen to have a competitive edge, and which can be used to advantage when developing branding initiatives.

At country level, however, the picture is varied.

Figure 6. Top four attributes where decision-makers in China, Germany, India and the US rank Denmark higher than their domestic market.

-  1. Organic
-  2. Animal welfare
-  3. Sustainability
-  4. Low environmental impact



There is a movement in the US towards having the choice to buy sustainably grown, climate-smart food that is pesticide-free. Danish brands are known for being high-tech and solution-oriented in this respect.

Madison Walker, head of public affairs, Grodan North America

The view from the US

Decision-makers in the US give Denmark a notably high ranking on sustainability, followed by organic and animal welfare. These are the only three areas where they see Danish exporters as stronger competitors than domestic suppliers.

Madison Walker, head of public affairs at Grodan in North America, suggests Danish exporters could gain from doing more to flag similarities with US goals and values. A good first step is to pin down what sustainability means to potential US customers. On this point, help could soon be at hand, she explains, as the USDA's Partnerships for Climate-Smart Commodities initiative is currently working on a definition.

“*Science-based and low environmental impact mean a lot on the Chinese political agenda. We have a good dialogue with the Chinese authorities, who want us to transfer Danish knowledge.*”

Anders Carøe Bylling, group vice-president, Aller Aqua

The view from China

Chinese decision-makers rank Danish products and solutions significantly higher than domestic suppliers on animal welfare and organic, followed by low environmental impact, sustainability and science-based. For Anders Carøe Bylling, group vice-president at Aller Aqua and managing director of the group's subsidiary in China, the picture is easily recognisable.

Environment is a core focus of China's current five-year plan for social and economic development. According to Bylling, this is driving dialogue about Danish solutions that support sustainability and efficiency. Denmark's organic strengths, he adds, connect with a reputation for 'clean' products that are healthy and safe. A point to note here is, that Chinese decision-makers still rank their home market as a better performer on health in this year's survey.



The view from Germany

In Germany, decision-makers see a close similarity between Danish and home market strengths. Organic, low environmental impact and natural are three attributes that mildly stand out.

Petter Aagesen, sales and marketing director at Thise Dairy, puts this down to the two countries' geographical and cultural connection and the fact that their food and agricultural industries are subject to the same EU regulations. Exporters should be aware, though, that the cultural connection to Denmark is closest in the northern part of Germany. When targeting the south, they may need to adapt their branding strategy to regional preferences and expectations.

“*There is high trust in Germany that we make natural, clean and good products. Organic is part of that picture.*”

Petter Aagesen, sales and marketing director, Thise Dairy

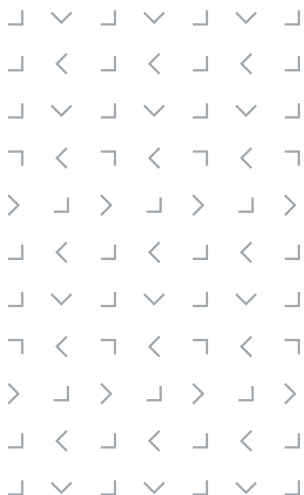
To move forward in India, it's important to link your brand with something that makes a difference to society. It's about bringing your sustainability strategy to life locally.

Kristian Henningsen, director of public affairs, Carlsberg

The view from India

Decision-makers from India primarily favour Denmark's science-based reputation above home market capabilities, ranking organic and food safety in joint second place and low environmental impact and growth-creating in joint third.

Due to the size and diversity of the Indian population, Kristian Henningsen, director of public affairs at Carlsberg, recommends that Danish exporters focus on identifying state-level preferences and regulations before entering the market. Successful branding strategies may also incorporate an element of community involvement, for example by contributing to local water resources in areas where water is scarce.



Where does Denmark lag behind home markets?

Overall, there is broad potential to improve perceptions of Danish food and agricultural products and solutions relative to decision-makers' home markets. At the bottom end of the scale, decision-makers list affordable, good taste, fresh and flexibility as areas where they see Denmark as lagging behind (figure 7) – again with country-specific variations.

In China and India, decision-makers rank affordability lowest, followed by good taste. Flexibility, good taste and consistency are the weakest links from a US and German perspective.

“We must keep reminding importers about the quality attributes of Danish products so they remain top of mind rather than attributes such as cost.”

Professor Polymeros Chrysochou, industry cooperation coordinator, MAPP Centre, Aarhus University

Concerning freshness, German decision-makers alone give this attribute a slightly positive score. US decision-makers are also the only respondents that find Danish products and solutions similarly affordable to home market offerings.

These findings are a reminder of the importance of fieldwork. Exporters may have much to gain from identifying potential negative perceptions of their brand in a given market and adapting their branding strategy to suit. Without adaptation, the risk of failure is high.

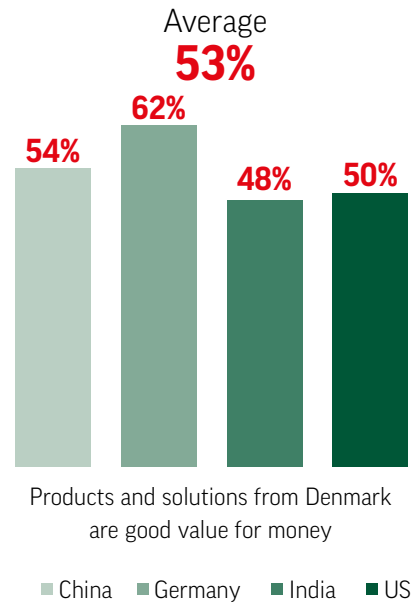
“We have to translate our products to a Chinese context. If we don't adapt, the taste won't live up to their expectations.”

Anders Carøe Bylling, group vice president, Aller Aqua



Figure 7. Bottom four attributes where decisionmakers in China, Germany, India and the US rank Denmark lower than their domestic market.

Figure 8. Attitudes towards the Danish food and agriculture industry by market (% agree or strongly agree).



Are exports from Denmark good value for money?

Although Danish products and solutions are not considered affordable by decision-makers in three of the four surveyed markets, more than half of respondents give a positive rating on value for money (figure 8). German decision-makers drive up the average, being 62% in agreement, while only 48% of decision-makers in India associate value for money with Denmark.

At Aarhus University's MAPP Centre, Polymeros Chrysochou regards the value for money score as highly relevant. In export markets where Danish products and solutions are seen to be expensive, branding strategies must persuade customers that they are worth their premium price. As Chrysochou remarks, this requires a consistent, long-term effort.



Summary of recommendations for building brand strengths in export markets

- **Unravel local perceptions of attributes**
Take time to understand what export customers mean by 'high quality' or 'sustainable' products. Adapt your messaging to reflect local expectations and challenges.
- **Understand your brand weaknesses as well as strengths**
Evaluate the risk of negative perceptions about your product or solution in target markets. Incorporate your risk assessment in your branding strategy.
- **Investigate government policies and statements of intent**
Identify common ground between your brand and government policies and campaigns. Make it part of your brand conversation.

CASE: THISE

Branding the dairy behind the organic label

Clear and consistent communication is the bedrock of Thise's success in the German market for organic dairy products. For the past three decades, the dairy cooperative's organic label has connected the brand with animal welfare, sustainability and clean naturalness – attributes of high importance to German consumers⁸.

But not all stories can be told by the label. In a highly competitive market where consumers are typically interested in the company behind the products, Thise has recognised the need to strengthen its corporate brand.

Top export advice

- » *Anticipate the big cultural difference that lies just across the Danish border.*
- » *Recognise the potential language barrier – make sure you speak German.*
- » *Identify the attributes and values that make your brand relevant in the German market.*

Everything is relevant

Sales and marketing director Petter Aagesen explains: "As a supplier of organic products, we tend to get more questions from retailers and consumers. Everything that we do as a company is relevant. We make a conscious effort to communicate about our focus areas so this can also help consumers in their buying choices."

The most recent corporate news was the decision by the Thise Cooperative Society to remove soya from the feed given to the cows, young animals and calves. The motivation was to cut carbon emissions from milk production and help prevent rainforest clearance for soya cultivation. As of 1 October 2022, Thise farmers have used feed of entirely European origin.

Spreading the word

A media campaign has spread word of the initiative to the German press and customers. Petter Aagesen expects to use it actively at trade fairs – quite a change from a few years ago, when the focus was on pure product branding.

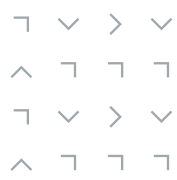
"The estimated climate impact of imported soya corresponded to around a third of our farmers' carbon emissions, when emissions from biological processes are excluded. We know that climate is a major concern among German consumers, so we hope that our efforts to reduce our climate impact will also strengthen our market position."

Case based on an interview with Petter Aagesen, sales and marketing director, Thise Dairy.

Core business: Organic dairy products.



⁸ Landbrug & Fødevarer: <https://lf.dk/tal-og-analyser/forbrugere-og-trends/eksportmarkeder/markedsanalyse-tyskland>



CASE: GRODAN

Partnership puts the spotlight on indoor crops

Joining the Resource Innovation Institute (RII) was an easy decision for Grodan in the US. A non-profit partnership dedicated to controlled environment agriculture (CEA). RII was an ideal forum for meeting and collaborating with others in the industry.

It was also a chance to raise awareness about Grodan's stone wool growing media for precision cultivation of indoor crops.

Shared mission

In RII, Grodan found an organisation with a similar mission to support the development of sustainable, high-yield agriculture with a strong focus on resource efficiency.

"Water quality and scarcity are two issues that plague US decision-makers and farmers, especially in California and Colorado. Finding new ways to grow food is paramount. Indoor growing is one solution," says Madison Walker, head of public affairs at Grodan North America.

Best practice

When RII received a United States Department of Agriculture grant to develop a series of CEA best practice guides, Grodan was recruited as a technical advisor. Working alongside partners who were also competitors was never an issue.

"This gave us the opportunity to link arms and talk about the industry. It was a case of putting ourselves in the conversations we wanted to have and making ourselves visible," Walker states.

"Doors also opened to more niche conversations about food safety, where we discussed how to communicate to the market that indoor grown food is safe, nutritious and often pesticide-free."

Industry exposure

In November 2022, Grodan participated with RII partners in the 2022 Resilient Harvests Conference on greenhouse and vertical farming – an event that brought further attention to the stone wool business.

As Walker remarks, the benefits of joining the RII partnership have exceeded all expectations.

"By supporting non-profit USDA research, we have become part of the industry in a different way. As a result, we have gained new, unexpected opportunities and relationships that have expanded into Europe."

*Case based on an interview with André van Wageningen, head of public affairs and sustainability EU, and Madison Walker, head of public affairs North America, Grodan.
Core business: Stone wool growing media solutions for horticulture.*

Top export advice

- » Build partnerships with non-profit organisations, trade associations or others that support your products and have similar ambitions.
- » Focus on the benefits of your brand that are relatable to Americans.
- » Speak American in your branding material – use US spellings and measurements and an American voice-over in videos.





GROWTH

A STRONG FOUNDATION FOR GROWTH

Towards new export adventures with solid brand assets within sustainability

Food Nation has surveyed key export markets for the Danish food and agriculture sector over five consecutive years. During that time, 4,315 decision-makers have participated from eight countries. Several markets have featured more than once, including the four markets in the 2023 survey.

Although the findings of these annual surveys are not directly comparable, it is possible to identify tendencies from the responses of decision-makers across markets and over time. This chapter looks at where Denmark’s image as a food nation has performed best and worst since the first survey in 2019 and highlights attributes of recurring high importance on export markets – particularly sustainability, food safety, health, technology and resource efficiency.

The 2019 survey gave an initial overview of the attributes that decision-makers tend to associate with Denmark. Using these findings as a baseline, successive surveys have explored and broadened this picture. For this reason, the data shown in the charts is drawn from the surveys conducted between 2020 and 2023.

Top attributes 2020-2023

The top attributes that decision-makers associate with Denmark have remained largely constant since 2019, even though the surveys were conducted in different markets (figure 9). Among these attributes, quality is untouchable as the attribute that most decision-makers choose when asked to describe their perceptions of Danish food and agriculture products and solutions. Sustainability and food safety have also always made it into the top five.

Figure 9. Top 5 attributes that international decision-makers associate with Danish food and agricultural products and solutions in the 2023 survey compared with the ranking of these attributes in previous surveys.

	2023	2022	2021	2020
Quality	1	1	1	1
Organic	2	3	2	8
Food safety	3	4	4	3
Sustainability	4	2	3	2
Reliable	5	5	18	4

Organic first made it into the top five in 2020, dislodging low environmental impact. In 2021, when supply chains were challenged by Covid-19, reliability took a heavy dive in the ratings and was replaced by natural.

The highest scores in 2019 went to attributes related to product quality – consistency, food safety, transparency, reliable, good taste and fresh. Other top scorers were organic, sustainability and health.

Professor Polymeros Chrysochou from Aarhus University points out the close link between the top attributes. As the leading attribute, quality is an umbrella term that is likely to encompass the other top-five attributes. For some decision-makers, organic, sustainability and low environmental impact, for example, may also be interchangeable. It is the country-specific definitions of these attributes that Danish exporters must uncover and understand when shaping key brand messages.

Bottom attributes 2020-2023

A number of brand challenges appear to be long term. The overview of lowest performing attributes shows that affordability is the attribute that

decision-makers consistently associate least with Danish food and agricultural products and solutions (figure 10) – though they are typically seen as good value for money. Flexibility has also always been close to the bottom of the list, along with growth-creating.

The lowest scores in 2019 were related to ways of working, which covers trustworthy, cooperation, innovative, science-based and flexibility, and financial impact, covering affordable and growth-creating.

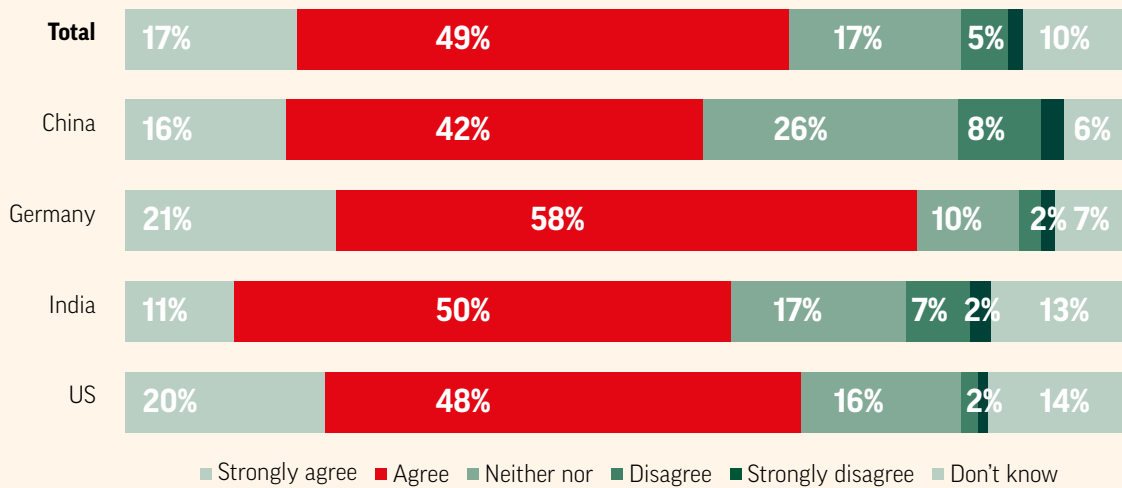
With the exception of affordability, these findings raise a few surprised eyebrows among the experts who have contributed market-specific insights to this report. One potential reason for the low score on flexibility could be Denmark’s systematic approach to processes and management systems. The poor ranking on consistency and transparency may also be counterbalanced by the high scores for reliability.

Whatever the explanation, these areas of sustained low performance point again to the critical importance of understanding export markets and what Danish brands could highlight to meet local expectations.

Figure 10. Decision-makers’ bottom-five associations with Danish food and agricultural products and solutions over time.

	2023	2022	2021	2020
Consistency	15	18	9	19
Transparency	16	17	12	17
Growth-creating	19	19	16	20
Flexibility	21	20	19	18
Affordable	22	21	21	21

Figure 11. Danish companies offer products and solutions that support sustainable production across the value chain (% decision-makers who agree with this statement).



A strong reputation for sustainability

In this year's survey, 66% of decision-makers agreed that products and solutions from Denmark support sustainable production across the food and agriculture value chain (figure 11) – a finding consistent with previous surveys.

“Sustainability is many things – covering transport, packaging and CO₂. It's important to be clear about what you do in these areas. Customers must understand how you contribute.

Petter Agesen, sales and marketing director, Thise Dairy

“When governments look at giving market access to Danish brands, they're also looking for jobs, investments and development in general. As such, your sustainability strategy is part of your brand proposition.

Kristian Henningsen, director of public affairs, Carlsberg

The sustainability theme of the 2020 survey provided detailed insights into the needs and interests of key export markets – in this case, China, Germany, India, Japan, the UK and the US. Two key points from these findings stand out: sustainability is not only gaining importance for decision-maker companies but also becoming an essential requirement for long-term growth.

In other words, sustainability is a strong brand positioning on export markets, and Danish export companies may have a reputational head start.

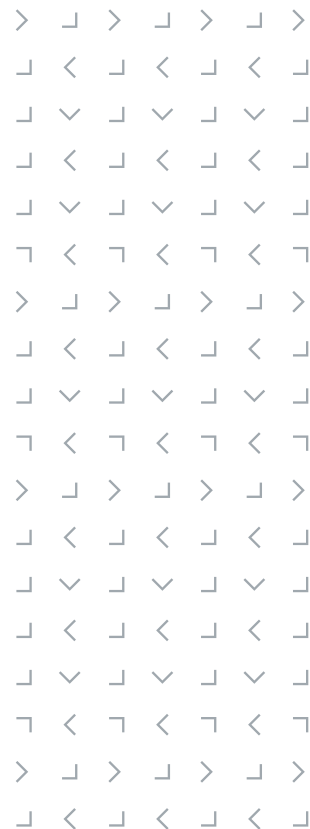
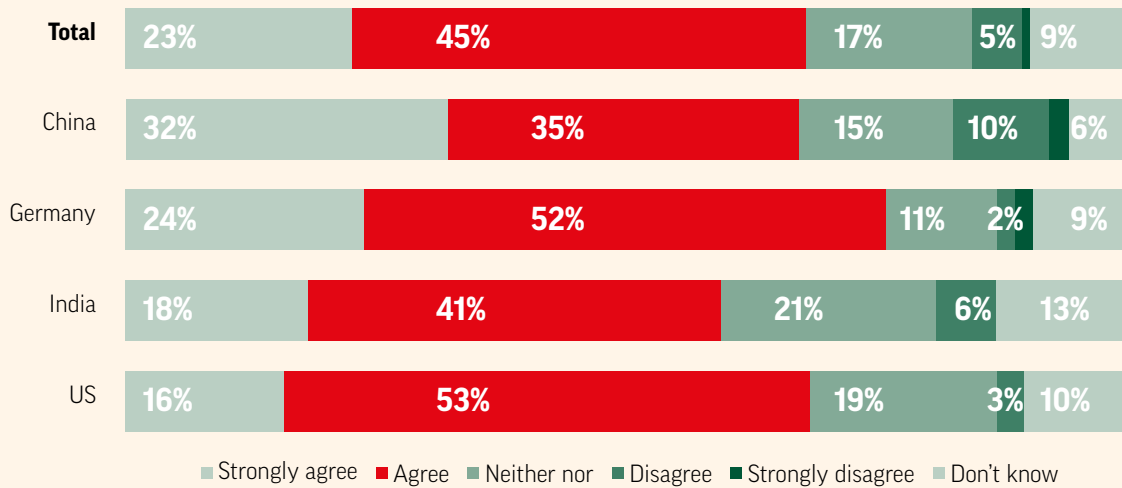


Figure 12. Denmark is a strong contributor of products and solutions that uphold a high level of food safety and support resource efficiency (% decision-makers who agree with this statement).



“What’s interesting about the Chinese market is that there is a trade willingness. If you have a solution that will solve their problem, they are willing to try it.”

Anders Carøe Bylling, group vice president, Aller Aqua

Food safety and resource efficiency

Almost seven in 10 decision-makers – 68% – in this year’s survey recognise Denmark as a strong provider of technological products and solutions that contribute to high food safety standards and resource efficiency. The strong association with food safety is a recurring tendency, visible in all Food Nation surveys since 2019.

In 2021, the survey of decision-makers in China, Germany and the US had a specific food safety focus. Here, two out of three decision-makers stated that food safety is the most important indicator of food quality, while almost three out of four stated that a documented high level of food safety adds to product value.

“Right now, the US congress is working on the Farm Bill which funds all farming initiatives and laws that govern farming and is passed every five years. Food safety is one of the biggest topics in the bill and about how we protect consumers.”

Madison Walker, head of public affairs, Grodan North America

This long-term connection with food safety may help Danish exporters and export-ready companies gain a foothold when approaching a market for the first time.

Positive perceptions of health

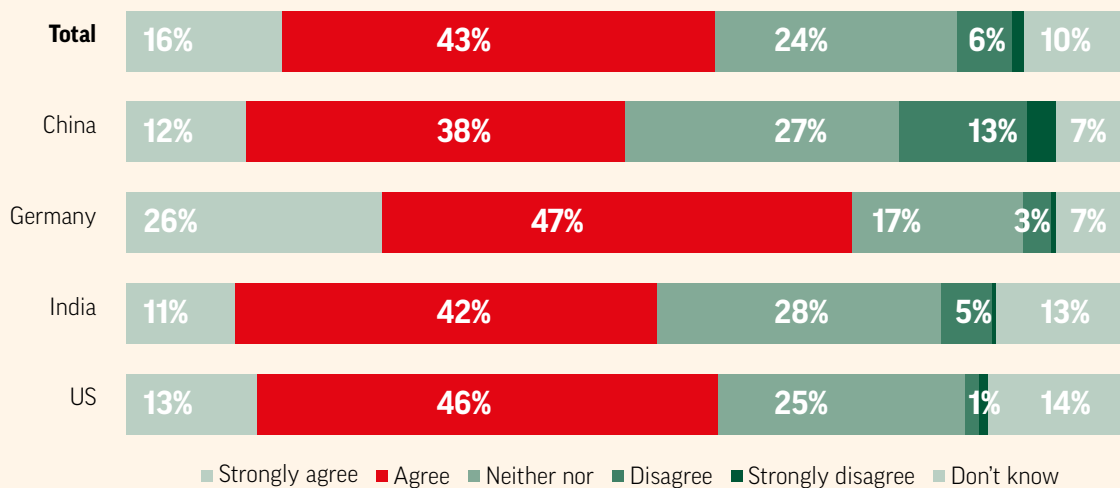
As a source of products and solutions that support global health, Denmark has a positive image among close to six in 10 – 59% – of decision-makers in this year’s survey (figure 13). German decision-makers have a particularly high opinion of the Danish contribution. However, health has not been a top-scoring attribute for Denmark over time.

The 2022 survey, with its health and sustainability focus, gathered key insights from decision-makers in Japan, South Korea, Vietnam and the UK. Here, nine in 10 decision-makers stated that health will become more important to their company in coming years. Decision-makers were also seen to associate health with food safety, organic and sustainability.

“The emphasis on health will only grow. How food is grown and where – this is going to become more important and front of mind.”

Madison Walker, head of public affairs, Grodan North America

Figure 13. Denmark is a strong contributor of products and solutions that support global health (% decision-makers who agree with this statement).



The take-home message is that Danish exporting companies could benefit from emphasising the link between health and sustainability in their branding messages. Further potential also exists to raise awareness of how Danish food and agricultural products and solutions support consumer health in general.

“Since Covid-19, people have become more conscious about health in general. Danish food and beverage companies that respond actively to this development have an opportunity to differentiate themselves as first-movers.

Kristian Henningsen, director of public affairs, Carlsberg

Summary of takeaways from five consecutive Food Nation surveys

- **Denmark’s international image and growth potential is consistent**
Decision-makers from key export markets continue to associate Danish food and agricultural products and solutions with the same strengths and weaknesses. These are key areas of potential for Danish exporters.
- **Sustainability is essential to long-term business growth**
Decision-makers recognise Denmark as a source of sustainable products and solutions. Successful branding strategies start with fieldwork to determine how sustainability is defined in each market and what matters most.
- **Documented food safety is a Danish hallmark**
Denmark is known for technological solutions that combine high food safety standards and resource efficiency. Both of these areas are high on international sustainability agendas, so this is a strong opportunity for Danish exporters.
- **Health is increasingly important in key export markets**
Decision-makers express increasing interest in solutions that support consumer health. Exporters with a health focus may benefit from including messages about food safety, organic and sustainability in branding campaigns.

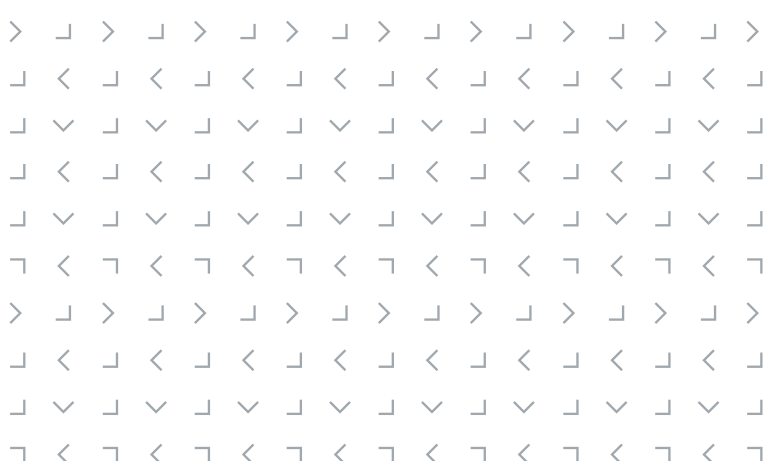
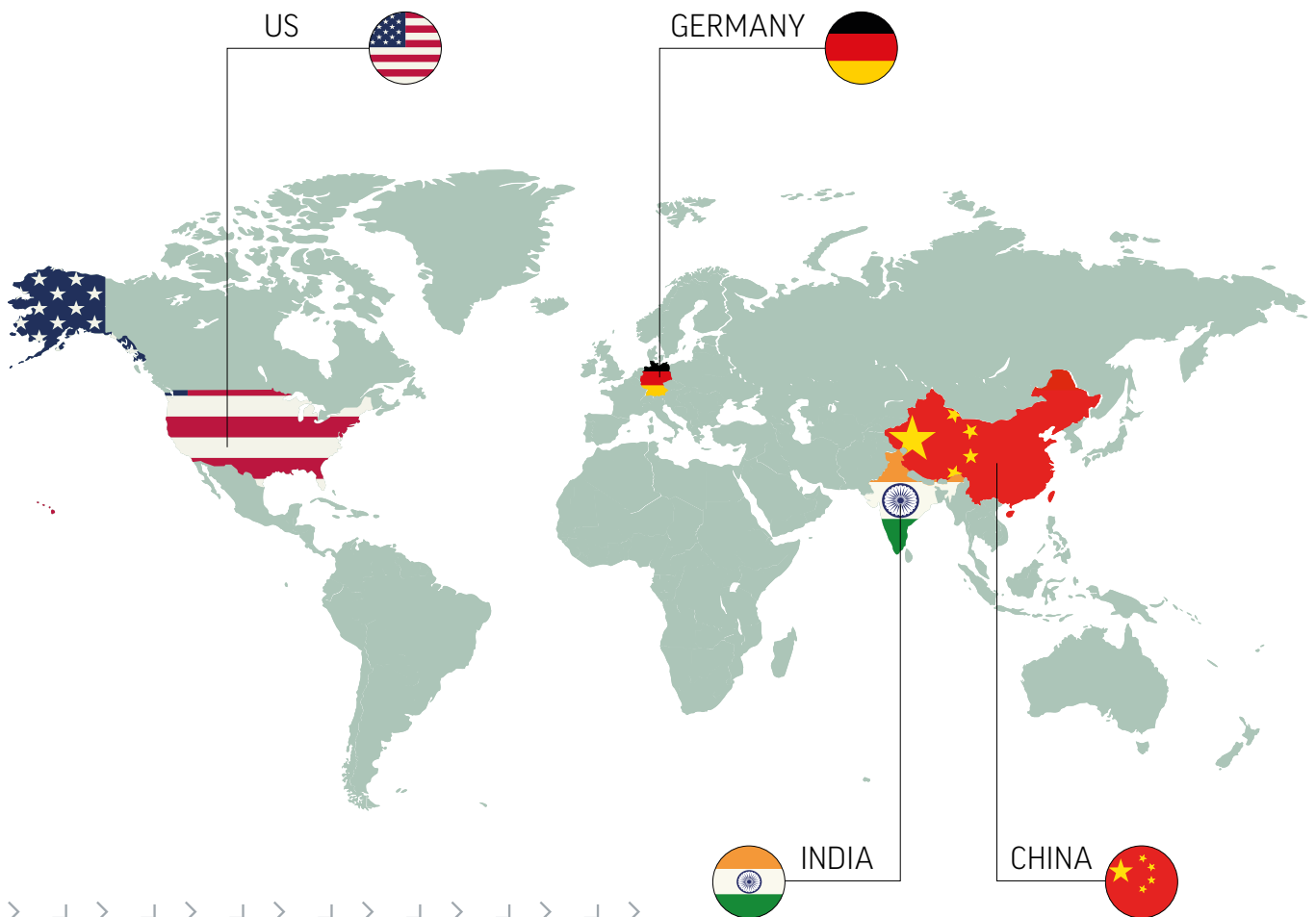
MARKET



MARKET DEEP DIVES

Decision-makers in China, Germany, India, and the United States have a range of beliefs and perceptions about Denmark as a food and agriculture nation. This chapter gives a country-by-country overview of key survey findings and export development figures.

Three top business opportunities have been identified for Danish companies to strengthen their sales dialogue and Denmark's overall position in each market.





Key findings and business opportunities

Drive awareness of Denmark as a food and agriculture nation

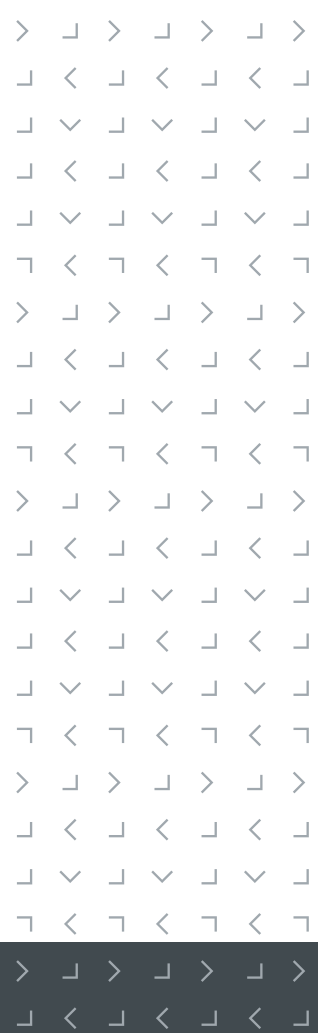
Denmark is top of mind for only 2% of Chinese decision-makers when asked to name food and agriculture nations. Danish companies should use the Danish strongholds to build awareness of Denmark as a leading nation for food and agricultural products and solutions.

Leverage Denmark's position as a frontrunner on animal welfare, organic and low environmental impact

Chinese decision-makers rate Danish products and solutions more positively than domestic counterparts with regard to animal welfare, organic solutions and low environmental impact. Many also regard Denmark as a source of products and solutions that support sustainable production. Danish companies could benefit from positioning themselves more strongly in China as relevant technology partners for driving sustainable development.

Leverage Denmark's position as a country with high food safety standards

Quality and food safety are equally important to Chinese decision-makers when producing, purchasing, selling or handling food and agricultural products and solutions. In addition, many agree that Denmark is a strong contributor of technological solutions that uphold food safety. Increasing awareness about quality assurance and hygiene programmes could be a key differentiator for Danish companies.



Brand awareness

Unaided awareness of Denmark as a food and agriculture nation stands at just 2% among Chinese decision-makers. The top five countries for awareness among Chinese decision-makers are India (39%), Indonesia (20%), Malaysia (17%), US (12%) and Brazil (9%). However, when asked, 56% agree that Denmark is a leading food and agriculture nation.

For 10% of Chinese decision-makers, country of origin is decisive when choosing a supplier of food products and solutions, with 82% stating that country of origin is very important or important. At the same time, 19% know little about Danish agricultural food products and solutions. Increasing awareness of Denmark as a food and agriculture nation is, therefore, a great opportunity to strengthen export activities.

What Chinese decision-makers say about Danish products and solutions

% who agree or strongly agree with the following statements

58% agree that Danish companies can offer products and solutions that support sustainable production across the value chain

67% agree that Denmark is a strong contributor of technological products and solutions that both uphold a high level of food safety and support resource efficiency

50% agree that Denmark is a strong contributor of products and solutions that support global health



CHINA

Attributes associated with Denmark

Chinese decision-makers associate Danish products and solutions with quality (58%) and food safety (48%) in particular. These are also top priority values when producing, purchasing, selling or handling food and agricultural products and solutions. Organic (44%) and sustainability (44%) are additional frequent associations.

Attributes associated with Danish food and agricultural products and solutions

TOP 5 ATTRIBUTES



58%
Quality



48%
Food safety



44%
Organic



44%
Sustainability



43%
Reliable

Values for Chinese decision makers when producing, purchasing, selling or handling food and agricultural products and solutions

TOP 5 VALUES



51%
Quality



51%
Food safety



46%
Good taste



44%
Trustworthy



42%
Reliable

As Denmark's performance on quality is already a well-established stronghold, food safety stands out as the key differentiator in China.

On the other hand, affordability, freshness and, especially, good taste are key challenges. With regard to these attributes, decision-makers have a considerably higher opinion of domestic products and solutions. Although Danish products and solutions score 35% lower than domestic products and solutions on affordability, 54% of decision-makers find them good value for money. This makes freshness and taste the most obvious focus areas to win the favour of Chinese decision-makers - highlighting the need to tailor products to local preferences.

Compared to their own market, decision-makers rate Danish products and solutions more favourably on animal welfare, organic and low environmental impact - revealing potential for leveraging Denmark's frontrunner position on these strongholds.

In this light, it is positive that 58% of decision-makers agree that Danish companies can offer products and solutions that support sustainable production across the value chain. As many as 67% regard Denmark as a strong contributor of technological products and solutions that secure a high level of food safety and support resource efficiency.

Trading with China

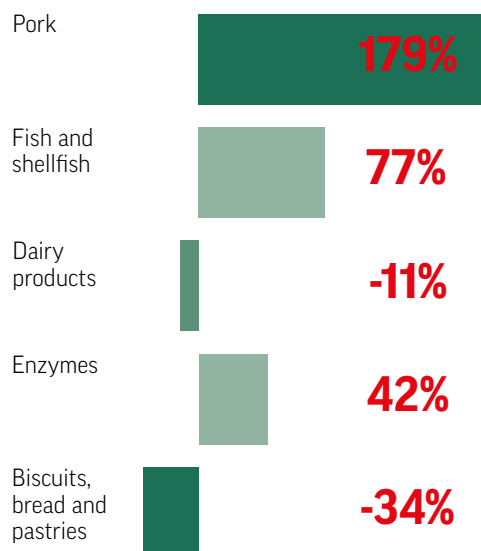
Denmark is a small trading partner for China, exporting goods totalling DKK 30.5 billion in 2022. Exports to China have increased by 22% since 2016, despite a 6% decline from 2021 to 2022 following the Covid-19 clampdown on Danish mink production. The food and agricultural goods sector, which includes bio-based products and machinery, accounted for 42% of total Danish exports to China in 2022.

Among the top five export categories, pork exports have risen most dramatically since 2018. This is partly due to swine fever in China. Fish, shellfish and enzymes are also attracting growing interest, while biscuits, bread and pastries are a new top five entry.

Compared to food and other bio-based products, food and agricultural machinery exports to China remain small (DKK 296 million in 2022) and have decreased by 5% since 2016.

Export development in top 5 categories, 2018-2022 from Denmark to China

(Statistics Denmark, 2022)



Export of food and agricultural goods, 2022

(Statistics Denmark, 2022)



Pork
6.4
billion



Fish and shellfish
3.2
billion



Dairy products
1.3
billion



Enzymes
501
million



Biscuits, bread and pastries
241
million

12.8
DKK billion

Total Danish exports of food and agricultural goods



GERMANY

Market deep dive

Key findings and business opportunities

Increase the high awareness of Danish food and agriculture companies

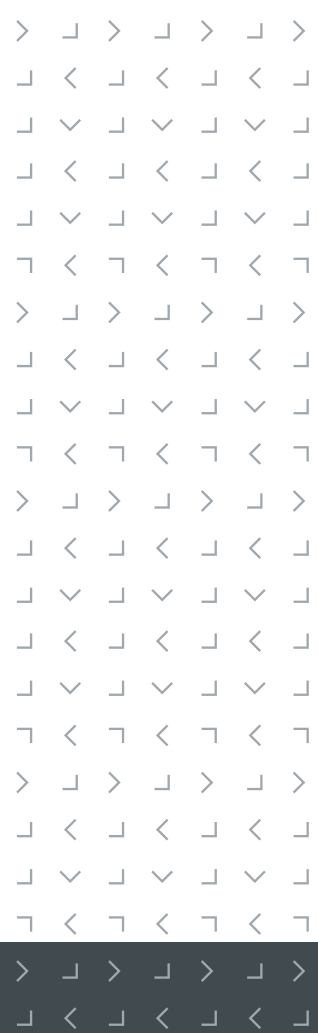
Denmark is top of mind for 26% of German decision-makers when asked to mention food nations. This corresponds well with the countries' long relationship as key trading partners and is a strong position for increasing awareness of Danish food and agriculture companies as reliable suppliers of high-quality products. Exporters should focus on raising awareness among those decision-makers who still have little knowledge of what Denmark can offer.

Leverage Denmark's position as a frontrunner for solutions that are organic, natural and low in environmental impact

German decision-makers frequently associate organic, natural and low environmental impact with Danish food and agricultural products and solutions, rating them higher on these attributes than domestic offerings. Danish companies should leverage this frontrunner position, especially in respect of low environmental impact which is the most important attribute for German decision-makers.

Leverage Denmark's position as a contributor of technological products and solutions

Most German decision-makers consider Denmark a strong contributor of technological products and solutions that secure a high level of food safety and support resource efficiency. Given the high importance of food safety in Germany, Danish food and agricultural companies could benefit from positioning themselves as relevant technology partners for driving food safety and reducing environmental impact.



Brand awareness

With an unaided awareness of 26% among German decision-makers, Denmark is third on the top five list of top-of-mind countries, behind France (40%) and Italy (28%) and ahead of Netherlands (23%) and China (19%). When asked, 74% agree that Denmark is a leading food and agriculture nation. However, there are still 18% of German decision-makers who claim to know little about Danish food and agricultural products and solutions.

For 16% of German decision-makers, country of origin is decisive when choosing a supplier of food products and solutions, while 79% state that country of origin is very important or important. This emphasises the need to develop and maintain awareness of the Danish brand. Raising awareness has significant potential in Germany, as 18% state that they don't know much about Danish food and agricultural products and solutions.

What German decision-makers say about Danish products and solutions

% who agree or strongly agree with the following statements

79% agree that Danish companies can offer products and solutions that support sustainable production across the value chain

76% agree that Denmark is a strong contributor of technological products and solutions that both uphold a high level of food safety and support resource efficiency

73% agree that Denmark is a strong contributor of products and solutions that support global health



GERMANY

Attributes associated with Denmark

German decision-makers associate Danish products and solutions with quality (51%) and health (51%) in particular. For them, quality and food safety are key values when producing, purchasing, selling or handling food and agricultural products and solutions. Animal welfare (49%) and organic (48%) are also frequently associations with Danish food and agricultural products and solutions.

Attributes associated with Danish food and agricultural products and solutions

TOP 5 ATTRIBUTES



51%
Quality



51%
Healthy



49%
Animal welfare



48%
Organic



48%
Fresh

TOP 5 VALUES

Values for German decision makers when producing, purchasing, selling or handling food and agricultural products and solutions



52%
Quality



47%
Food safety



44%
Fresh



44%
Good taste



43%
Healthy

There is a positive match between the values important to German decision-makers and the attributes they associate with Danish products and solutions. They see quality as a particular Danish stronghold and Denmark overall as a strong brand in the German market.

However, German decision-makers prefer domestic products and solutions over imports and primarily rate Danish products and solutions more favourably than their own for their organic, low environmental impact and natural attributes. Although they rate Denmark lower for good taste and affordability, decision-makers still appreciate Danish performance on taste, and 62% agree that Danish companies provide good value for money.

On the basis of what decision-makers find important, low environmental impact is considered the key differentiator in the German market. This is supported by the fact that 79% of decision-makers see Denmark as a source of products and solutions that support sustainable production across the value chain – and 76% agree that Denmark is a strong contributor of technological products and solutions that secure a high level of food safety and support resource efficiency.

Trading with Germany

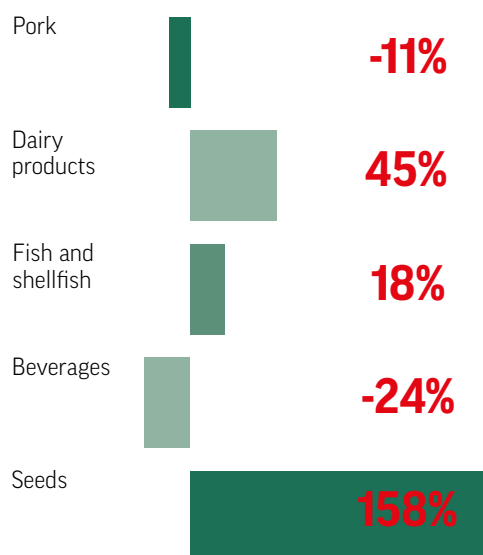
With an export of goods that total DKK 137.7 billion, Germany is one of Denmark's long-standing key trading partners. Since 2016, total Danish exports have increased by 36%. 28% of that was from 2021 to 2022. In 2022, food and agricultural goods, including bio-based products and machinery, accounted for 23.2% of exports.

Pork exports, representing the largest category, are down 11% since 2018. Seed exports stand out with 158% growth from 2018 to 2022, putting them among the top five export categories. Dairy products have overtaken fish and shellfish and are now in second place, although both have risen significantly over the period.

Exports of food and agricultural machinery are increasingly important and reached DKK 1.6 billion in 2022, equivalent to 86% growth since 2016.

Export development in top 5 categories, 2018-2022 from Denmark to Germany

(Statistics Denmark, 2022)



Export of food and agricultural goods, 2022

(Statistics Denmark, 2022)



Pork
6.1
billion



Dairy products
5.4
billion



Fish and shellfish
4.9
billion



Beverages
2.0
billion



Seeds
1.2
billion

31.9
DKK billion

Total Danish exports of food and agricultural goods



Key findings and business opportunities

Drive awareness of Denmark as a food and agriculture nation

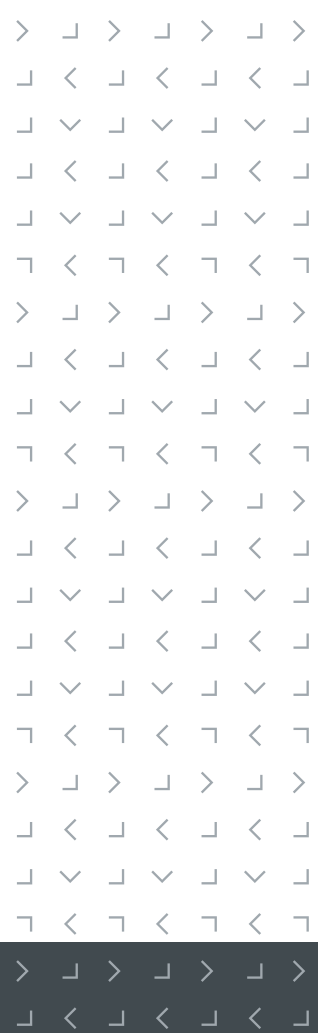
Denmark is top of mind for 7% of Indian decision-makers when asked to mention food nations. Food and agricultural companies should use the Danish strongholds to build awareness of Denmark as a leading country for food and agricultural products and solutions.

Leverage Denmark's position as a country with high food safety standards

Food safety is important to Indian decision-makers when producing, purchasing, selling or handling food and agricultural products and solutions. They also see food safety as a Danish stronghold, with most agreeing that Denmark is a strong contributor of technological products and solutions that secure a high level of food safety. So, increasing awareness about quality assurance and hygiene programmes, for example, could be a key differentiator for Danish companies.

Leverage Denmark's position as a frontrunner for organic and science-based products and solutions

When it comes to being science-based and organic, Indian decision-makers rate Danish products and solutions more positively than domestic products and solutions. Danish companies should showcase strongholds within organic production and emphasise how science-based products and solutions increase transparency in line with the priorities of Indian decision-makers.



Brand awareness

A modest 7% of Indian decision-makers have Denmark on their radar as a food and agriculture nation. The top five countries for unaided awareness are China (42%), US (21%), Indonesia (16%), Germany (15%) and France (13%). However, when asked, 52% agree that Denmark is a leading food and agriculture nation.

For 4% of Indian decision-makers, country of origin is decisive when choosing a supplier of food products and solutions, while 76% state that country of origin is very important or important. At the same time, 29% state that they don't know much about Danish food and agricultural products and solutions. Raising brand awareness in India is therefore important.

What Indian decision-makers say about Danish products and solutions

% who agree or strongly agree with the following statements

61% agree that Danish companies can offer products and solutions that support sustainable production across the value chain

59% agree that Denmark is a strong contributor of technological product and solutions that both uphold a high level of food safety and support resource efficiency

53% agree that Denmark is a strong contributor of products and solutions that support global health



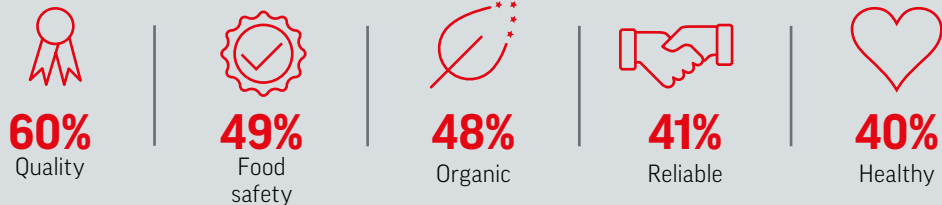
INDIA

Attributes associated with Denmark

Indian decision-makers associate Danish food and agricultural products and solutions primarily with quality (60%) and food safety (49%), closely followed by organic (48%) and reliable (41%). Quality, good taste and food safety are most important to decision-makers when producing, purchasing, selling or handling food and agricultural products and solutions.

Attributes associated with Danish food and agricultural products and solutions

TOP 5 ATTRIBUTES



Values for Indian decision makers when producing, purchasing, selling or handling food and agricultural products and solutions

TOP 5 VALUES



When the values of highest importance to Indian decision-makers are compared with the attributes they associate with Danish products and solutions, food safety stands out as the key differentiator in India. Denmark's performance on quality is already considered a stronghold.

Indian decision-makers rate Danish products and solutions more favourably than domestic offerings on food safety and see Denmark as more science-based and organic. On this basis, there is potential to leverage Denmark's frontrunner position by making active use of these strongholds in branding and marketing activities.

Affordability, transparency and consistency are key challenges. Danish products and solutions score 20% lower for affordability than domestic products and solutions, although 48% of decision-makers still find them good value for money. Improving the transparency and consistency of brand communications is a clear focus point to match decision-makers' priorities.

Indian decision-makers also prefer domestic products and solutions over imports when it comes to good taste, healthy and freshness. However, Denmark still performs well on all counts, in their view.

The importance of food safety is repeated by the 59% who regard Denmark as a strong contributor of technological products and solutions that secure a high level of food safety and support resource efficiency.

Trading with India

Denmark is a small trading partner for India, exporting goods totalling DKK 5.5 billion in 2022.

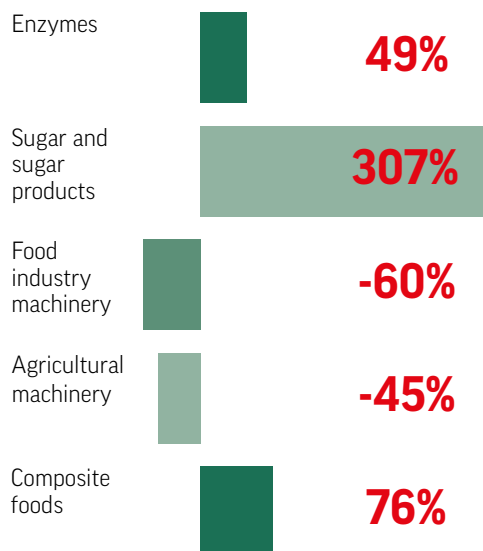
However, exports have increased by 108% since 2016 – 73% since 2020 alone. Food and agricultural goods, including bio-based products and machinery, accounted for 5.6% of total Danish exports in 2022.

Enzymes is the most important export category, with 49% growth from 2018 to 2022. Exports of sugar and sugar products stand out for 307% growth since 2018. Composite foods have also attracted growing interest from the Indian market during this time.

Exports of food and agricultural machinery reached DKK 49 million in 2022. Although this is 44% higher than in 2016, the decline from 2018 to 2022 can be explained by a three-year spike in machine exports which came to an end in 2020.

Export development in top 5 categories, 2018-2022 from Denmark to India

(Statistics Denmark, 2022)



Export of food and agricultural goods, 2022

(Statistics Denmark, 2022)



Enzymes
141
million



Sugar and sugar products
31
million



Food industry machinery
28
million



Agricultural machinery
21
million



Composite foods
16
million

310

DKK million

Total Danish exports of food and agricultural goods



Key findings and business opportunities

Drive awareness of Denmark as a food and agriculture nation

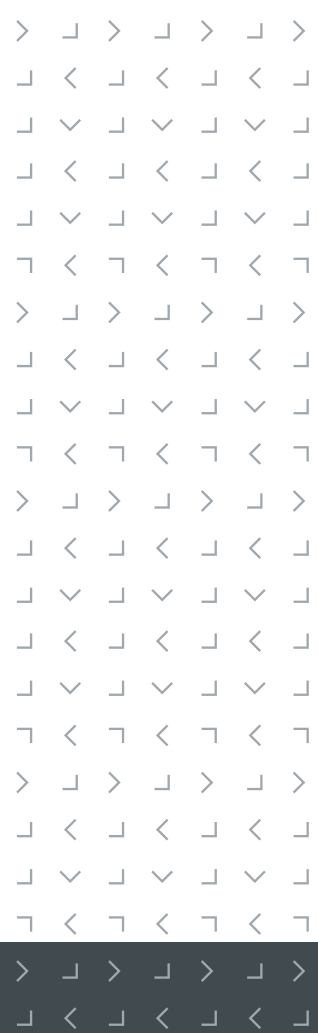
Among US decision-makers, 8% have Denmark as a top-of-mind food nation. Food and agricultural companies should use the Danish strongholds to build awareness of their products and solutions and of Denmark as a trustworthy and reliable country of origin.

Showcase Danish products and solutions within social and environmental sustainability

Denmark's strongholds within social and environmental sustainability, including organic and animal welfare, are key when promoting Danish products and solutions in the US. As a provider of products and solutions that support sustainable production across the value chain, Denmark is a relevant partner for sustainable development.

Leverage Denmark's position as a food safety frontrunner

Food safety is highly important to US decision-makers, who also consider it a Danish stronghold. Most also see Denmark as a strong contributor of technological products and solutions that secure a high level of food safety. Danish companies could use this frontrunner position to position themselves as relevant technology partners for driving food safety.



Brand awareness

Denmark is a top-of-mind country for 8% of US decision-makers with regard to food and agricultural products and solutions. They primarily mention China (42%), Mexico (28%), Canada (26%), Germany (23%) and France (21%). When asked, 51% agree that Denmark is a leading food and agriculture nation, while 38% claim to know little about Danish products or solutions.

Country of origin is of decisive importance for 9% of US decision-makers when choosing a supplier of food products and solutions, while 88% say it is very important or important. This highlights the need to build and maintain a strong Danish brand. At the same time, 38% state that they don't know much about Danish agricultural food products and solutions. Therefore, raising brand awareness in the US has great potential.

What US decision-makers say about Danish products and solutions

% who agree or strongly agree with the following statements

68% agree that Danish companies can offer products and solutions that support sustainable production across the value chain

69% agree that Denmark is a strong contributor of technological products and solutions that both uphold a high level of food safety and support resource efficiency

59% agree that Denmark is a strong contributor of products and solutions that support global health



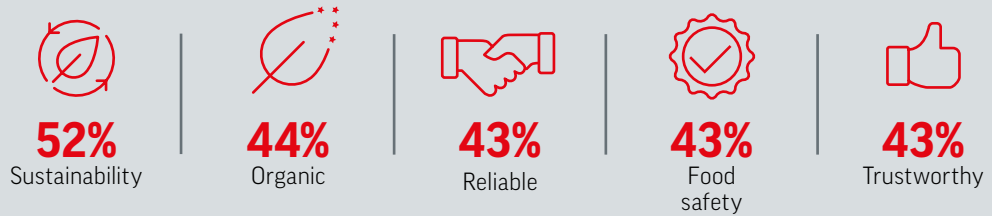
THE UNITED STATES

Attributes associated with Denmark

US decision-makers associate Danish products and solutions primarily with sustainability (52%) and organic (44%). Reliability and food safety are equally important to 43% of decision-makers – and are also top values for decision-makers when producing, purchasing, selling or handling food and agricultural products and solutions.

Attributes associated with Danish food and agricultural products and solutions

**TOP
5
ATTRIBUTES**



**TOP
5
VALUES**

Values for US decision makers when producing, purchasing, selling or handling food and agricultural products and solutions



A comparison of the values of importance to US decision-makers and the attributes they associate with Danish products and solutions reveals that sustainability is a clear differentiator. They rate Denmark highly on sustainability – and more favourably than domestic products and solutions. US decision-makers also perceive Danish products and solutions as having better organic and animal welfare attributes than home market offerings. However, they do not rank organic, animal welfare and low environmental impact nearly as highly as sustainability.

Affordability is the key challenge on the US market and could be an issue that requires attention. On the other hand, 50% agree that Danish products and solutions are good value for money.

Decision-makers have a considerably higher opinion of their own products and solutions from several perspectives. In particular, they rate Danish products and solutions lower on freshness and good taste – attributes of high importance to decision-makers. Consideration of local taste preferences is important when approaching the US market.

Supporting sustainability as the key differentiator, 68% of decision-makers agree that Danish companies can contribute to sustainable production across the value chain. In addition, 69% consider Denmark a strong contributor of technological products and solutions that secure a high level of food safety and support resource efficiency.

Trading with the US

The US is one of Denmark's largest export markets, receiving DKK 83 million in exported goods.

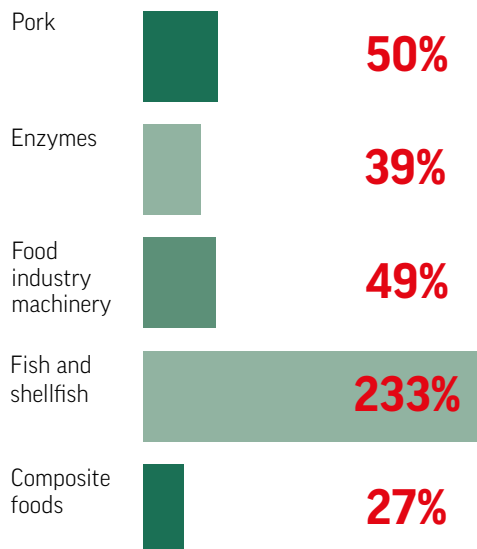
As a trading partner, the US continues to grow in importance – total Danish exports increasing 62% since 2016. The same is true for the Danish food and agriculture sector. In 2022, food and agricultural goods, including bio-based products and machinery, accounted for 9.5% of total exports.

Pork is back in first place as the most important export category, with 50% export growth since 2018. Among the top five export categories, fish and shellfish stand out for 233% growth from 2018 to 2022. Enzymes and composite foods are also attracting increased interest from the US market.

Exports of food and agricultural machinery reached DKK 1.4 billion in 2022 – a 49% increase since 2016. Most of these machinery exports are for the food industry, bringing this category alone into the top five.

Export development in top 5 categories, 2018-2022 from Denmark to the US

(Statistics Denmark, 2022)



Export of food and agricultural goods, 2022

(Statistics Denmark, 2022)



Pork
1.4
billion



Dairy products
1.2
billion



Food industry
machinery
987
million



Fish and
shellfish
983
million



Composite
foods
595
million

7.9

DKK billion

Total Danish
exports of food
and agricultural
goods



STRONG

DANISH STRONGHOLDS

Food Nation creates awareness of Denmark as a frontrunner for innovative, sustainable and effective food products and solutions. This includes highlighting the following strongholds, which Danish food and agricultural companies can use to advantage – both to boost their own exports and branding and to strengthen Denmark’s international brand.

COLLABORATION

Denmark’s collaborative culture is at the heart of the Danish food cluster’s reputation for ground-breaking innovation, high productivity and trustworthiness. Public-private partnerships are common. Collaborative efforts have raised Danish food quality and safety to world-leading standards.

GASTRONOMY

Denmark has achieved worldwide fame for its New Nordic Cuisine and a new generation of chefs, who continue to develop Danish food culture. The objective is to make the most of seasonal raw materials at every step of the food value chain. Danish cuisine is a role model for dynamic development in line with global trends.

HEALTH

Denmark is a source of extensive experience and know-how for solving global health challenges. Through partnerships between knowledge institutions, public authorities and the Danish food and agriculture sector, Denmark can deliver natural, healthy and highly nutritious food products and solutions.

INGREDIENTS

Denmark’s high concentration of ingredient companies and expertise represents an ecosystem of knowledge and innovation. The ingredient industry is skilled in developing solutions that enable feed and food manufacturers to make better use of resources, improve access to nutrition and support the health and wellbeing of livestock and consumers.

INNOVATIVE TECHNOLOGY

The green transition of the food and agriculture sector depends on innovative technology. New smart solutions support the world’s rising demand for safe and nutritious food by making it possible to produce more with less, increase efficiency and minimise energy consumption.

ORGANIC

Denmark has been on the world map as an organic frontrunner since the introduction of the state-controlled organic Ø-label in 1987. Today, consumers demand more natural and organic food products than ever – an area in which Danish food and agricultural companies excel.

SEAFOOD

Denmark is a leading innovation hub for fisheries and aquaculture. From offshore fisheries to land-based aquaculture and the seafood processing industry, Danish technology and knowhow continue to lower CO₂ emissions and increase efficiency, while maintaining the highest levels of food quality and safety.

SUSTAINABILITY

Denmark is globally recognised for sustainable food and agriculture and has led the world in producing solutions with minimal emissions, high resource efficiency and a small carbon footprint. We strive constantly to do better.

QUALITY & SAFETY

Around the world, Danish food products are synonymous with high quality, reliability and excellent hygiene. Our stringent production methods and innovative solutions ensure Danish food products stand out for their impeccable quality and food safety standards.

*Interested in reading more about the strongholds of the Danish food and agriculture cluster?
Download our whitepapers at www.foodnationdenmark.com/toolbox*

**FOOD
NATION**

Solutions of tomorrow
By Denmark

DENMARK
Frontrunner
in innovative,
sustainable and
effective food

foodnationdenmark.dk

ABOUT

ABOUT FOOD NATION

Food Nation is a non-profit partnership established by the Danish government and leading private organisations and companies. As a branding consortium, Food Nation exists to create awareness of Denmark as a frontrunner within innovative, sustainable and efficient food production and to provide a gateway for international stakeholders who seek information about food and agricultural products and solutions that are 'Made by Denmark'.

Food Nation welcomes international delegations to its visitor centres in Copenhagen and Aarhus. An interactive tour will introduce you and your business partners to the Danish food and agriculture strongholds.

Find out more about Food Nation's services and arrange a visit to the visitor centres at www.foodnationdenmark.com.

THE FOOD NATION VIRTUAL UNIVERSE

Enter the Food Nation Virtual Universe where you can explore and experience the strongholds of the Danish food and agriculture sector across the value chain. Inspirational webinars, digital publications, videos and online talks give an introduction to how Denmark is contributing to the green transition within the framework of UN's Sustainable Development Goals. Start exploring here: <https://live.foodnationdenmark.com>

FREE MARKETING MATERIAL

Food Nation provides Danish companies with insights and marketing materials to support their export journey. Visit www.foodnationdenmark.com/toolbox to download:

- Insight reports
- Publications, including white papers and cases
- Fact sheets and food facts
- On-demand webinars

ABOUT THE REPORT

This insight report is the fifth annual report on Denmark's image as a food and agriculture nation.

If you are interested in obtaining the data behind this report, contact Food Nation at foodnation@foodnationdenmark.dk.



Follow us on social media





Denmark is a market leader in both primary and processed food production.

CONTACT

Food Nation
Vesterbrogade 4A, 4th floor
1620 Copenhagen V
foodnation@foodnationdenmark.dk
+45 2491 4050

www.foodnationdenmark.com



Solutions of tomorrow
By Denmark



**FOOD
NATION**

Solutions of tomorrow
By Denmark