

# INSIGHT REPORT

**ON DENMARK AS A FOOD NATION 2020**

*Sustainability - a key export driver*



Solutions of tomorrow  
By Denmark

## **Insight report on Denmark as a food nation 2020**

Sustainability - a key export driver

Version 1.0 2020

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### **Survey and data**

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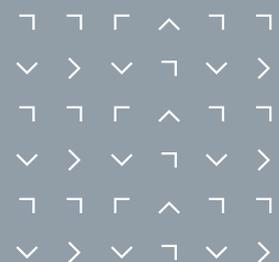
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READY

# FOREWORD

## Ready to lead the green transition

2020 got off to an unprecedented start in the face of a global pandemic. The effect on global markets is enormous, as we all find our way through this challenging time. Here at Food Nation, it has caused us to step up our efforts to draw international attention to Denmark's food and agricultural strengths – and provide Danish companies with a solid platform for maintaining and developing their export business. Now more than ever, it is crucial that we stand together to tell the strong story about Denmark as a leading food nation.

The impact of COVID-19 has created a opportunity to reboot the global economy with sustainable innovation. In many parts of the world, sustainable food products and solutions are already a growing priority for manufacturers, retailers and consumers. The United Nations Sustainable Development Goals have provided the framework to which many of us now refer to in our efforts to support the green transition.

When it comes to sustainability, the Danish food and agricultural sector is at the forefront. The 2020 insight report confirms this once again, finding that decision-makers in the United States, United Kingdom, Germany, China, India and Japan perceive Denmark as one of the most sustainable food nations in the world. Many rate Danish sustainability standards higher than those of their own country.

Over the years, Danish businesses have taken an ambitious and collaborative approach to new sustainable goals and regulations. As a result, the Danish food cluster has managed to integrate a sustainable mindset in all its work – whether within food safety, organics, gastronomy, health, innovative technology or ingredients – all while maintaining a high level of trustworthiness and reliability.

In this year's survey, conducted by Epinion, we asked decision-makers in six of Denmark's important export markets about their views on Danish food and agricultural products and solutions and how they perceive the topic of sustainability.

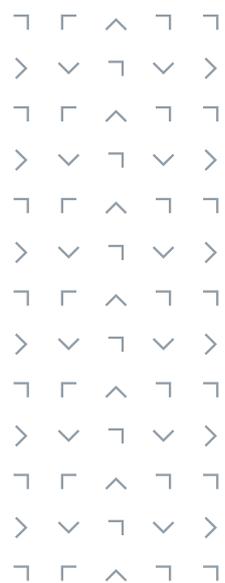
The findings show that Denmark has great potential to become a top-of-mind food nation. They also highlight significant potential to capture an even greater share of export markets through stronger, long-term communication about Danish products, strongholds and the added value they create. As the case stories in this report reveal, a number of companies are already reaping the benefits of branding strategies with an integrated message about the key strongholds of the Danish food and agricultural sector.

By standing together and unfolding the stories about Denmark as a leading food nation even more, we can all play a role in building Denmark's image as an international brand – and a nation that can make significant contributions to the green transition.

This annual insight report on Denmark is the second published by Food Nation for Danish food and agricultural companies and others that already export Danish food products and solutions or are about to start their export journey. It is our hope that the report will serve as a source of inspiration and tool when exporting Denmark's sustainable solutions of tomorrow.

Happy reading

Lise Walbom



# EXECUTIVE SUMMARY

This insight report explores international perceptions of Denmark as a food nation, including brand awareness and primary strongholds of the Danish food and agricultural sector. The report is based on the findings of an annual quantitative survey plus a series of qualitative interviews, conducted by Epinion for Food Nation. A total of 1,229 decision-makers from six of Denmark's key export markets for food and agricultural products and solutions have taken part.

The purpose is to give an update on Denmark's current international image as a food nation and highlight related business opportunities for Danish food and agricultural companies - both companies with a well-established international profile and others that are preparing to start their export adventure.

Perceptions and findings are reported under three themes: brand awareness, unique selling points and sustainability.

## ➤ **Brand awareness – great potential for growth**

Of the 22 countries that decision-makers list as top-of-mind food nations, Denmark is number 15. Danish food and agricultural companies have a lot to offer international trading partners, which means Denmark has great potential to expand its position as a globally recognised food nation. When asked directly about how they see Denmark, decision-makers give an exceptionally positive response. Around half perceive Denmark as a leading food nation that is known for strong brands.

As country of origin is a key consideration for most decision-makers when selecting an international supplier, Danish food and agricultural companies have a good starting point for developing their market share further. The biggest competition they face is from the domestic producers in export markets, as the majority of decision-makers prefer products and solutions from their own home market.

## ➤ **Unique selling points – Danish strongholds are valuable assets**

Danish food and agricultural exports are known for high quality and food safety standards, low environmental impact, animal welfare and a broad organic range. Danish businesses are recognised for their reliability and trustworthiness. Despite the relatively high cost of many Danish products and solutions, most decision-makers recognise that they are good value for money.

Good opportunities for market growth lie in branding strategies that make active and long-term use of the Danish food and agricultural sector's recognised strongholds. Such strategies can also play a role in convincing decision-makers to buy products and solutions with Danish roots rather than local.

## ➤ **Sustainability – Best in class food solutions**

Of all the Danish food cluster's strongholds, sustainability is the one that decision-makers rate highest – even rating Denmark higher than their own country. The survey shows that sustainability is almost universally top of the agenda, with most decision-makers stating that it will play an even more important role for their company in the future.

This is where Danish food and agricultural companies perhaps have the biggest opportunity to brand themselves on export markets and, at the same time, position Denmark as the nation that can deliver the sustainable solutions of tomorrow.

# KEY FINDINGS AND BUSINESS OPPORTUNITIES

The 2020 insight report confirms Denmark's great potential to expand as a globally recognised food nation. International trading partners generally agree that Danish food and agricultural companies with a base in Denmark and with a international profile have much to offer across a range of important strongholds.

The key findings highlight valuable business opportunities for exporting companies.

## ➤ **Grow Denmark's strong position abroad**

Businesses have the opportunity to influence Denmark's positive reputation among international decision-makers to an even greater extent in targeted strategic communication. As with all brand development strategies, the task of increasing awareness requires a sustained effort and patience. A number of companies already draw on the story of Denmark as a leading food nation in their corporate branding. Experience shows a positive effect when Danish strongholds are integrated in branding messages.

## ➤ **Strengthen international brand awareness by highlighting Danish strongholds**

The Danish food and agricultural sector is well recognised and widely regarded as trustworthy and reliable. Compared to domestic markets, animal welfare, sustainability, low environmental impact, food safety and organic solutions are particular strongholds, according to international decision-makers. To reach our full export potential, intensified communication about these specific strongholds is a good place to start.

## ➤ **Customise brand and communication messages to each market and defeat home bias**

Denmark's toughest competitors are the domestic food and agricultural producers on export markets. To defeat this home bias and underline why international decision-makers should choose products and solutions, companies should place greater emphasis on value-adding Danish strongholds in each market and adapt communication to local needs – positioning Denmark as a preferred country of origin.

## ➤ **Drive the green agenda with sustainable solutions of tomorrow**

Denmark is perceived as one of the world's most sustainable nations - at a time when sustainability is on almost everyone's agenda. Well-established procedures, products and solutions are in place to drive the green transition through the whole value chain. That gives Danish food and agricultural companies a powerful platform for communicating how they work with sustainability and the United Nations Sustainable Development Goals and, through that, their credibility as sustainable suppliers. By positioning Denmark as a country that can deliver tomorrow's sustainable solutions, we can expand further as a leading food nation.

# ABOUT

# ABOUT THE SURVEY



The insight report on Denmark as a food nation 2020 is based on a quantitative survey among decision-makers in six selected countries: the United States, United Kingdom, Germany, China, Japan and India. The survey was conducted by Epinion for Food Nation in December 2019 - January 2020.

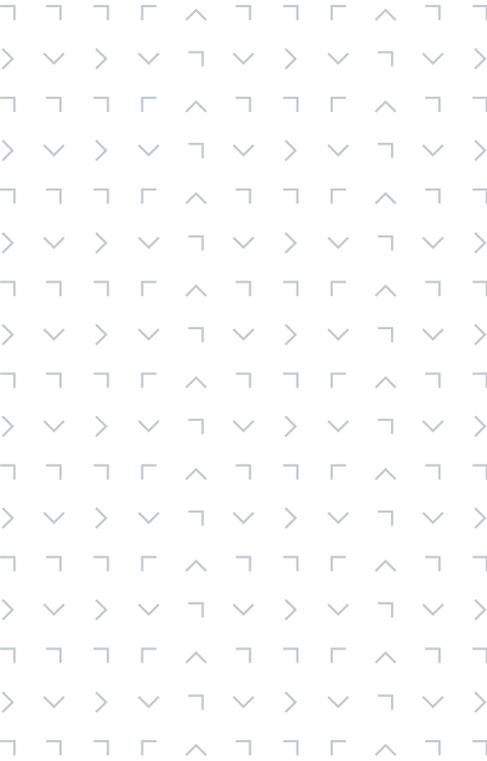
The survey examined Denmark's image as a food nation among decision-makers working with the production, purchasing, sale or handling of food and agricultural products and solutions in the six selected markets. In total 1,229 decision-makers participated in the survey.

In each market, the survey participants cover a broad range of companies, including small and medium-sized enterprises and large multinational companies from across the food value chain.

In addition to the survey, nine in-depth qualitative interviews were conducted with decision-makers from companies in the six selected markets.

Both unaided and aided questions have been asked to understand the international decision makers perspective on Denmark as a food nation.

COUNTRY	SURVEY Number of decision-makers
	200
	200
	221
	204
	201
	203
	Total <b>1229</b>





BRAND

# BRAND AWARENESS

## Great potential for growth

Awareness of Denmark as a leading food and agricultural nation is essential to position the nation as a relevant business and trading partner and expand the Danish share of international markets.

When international decision-makers are asked which countries are top of mind as suppliers of relevant food and agriculture products and solutions, 5% of them mention Denmark. By comparison, the top three in the food nation awareness ranking – China, the US and France – are mentioned by 28%, 25% and 14% respectively. Overall, Denmark ranks number 15 out of the 22 countries that decision-makers mention – making it by far the smallest nation in terms of population represented and the only country in Scandinavia - but with room for improvement in order to increase the brand awareness of Denmark as a top-of-mind food nation.

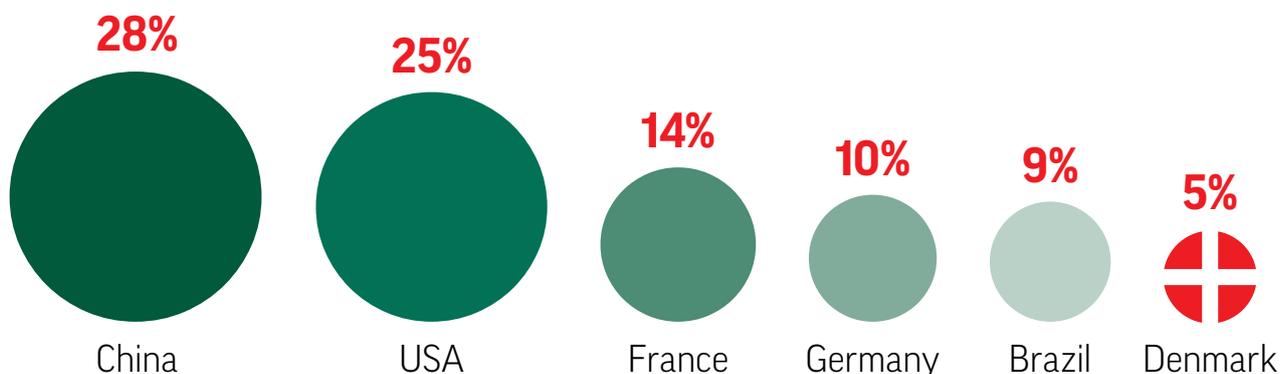
Decision-makers from Germany, the UK and Japan mention Denmark most frequently as a top-of-mind food nation. Denmark is less recognised in China, India and the US.

The degree of awareness often follows trade flow. The more products that Denmark exports to a country, the more likely decision-makers from that country will recognise Denmark as a food nation.

But there are exceptions to this rule. For example, awareness of Denmark as a food nation is noticeably low in the US, Germany and China compared to the share of exports. While it could be expected that higher sales would raise awareness of Denmark as a strong food nation, a higher level of awareness is likely to have a similar positive impact on sales. In other words, a drive to strengthen Denmark's brand positioning would benefit both awareness and sales.

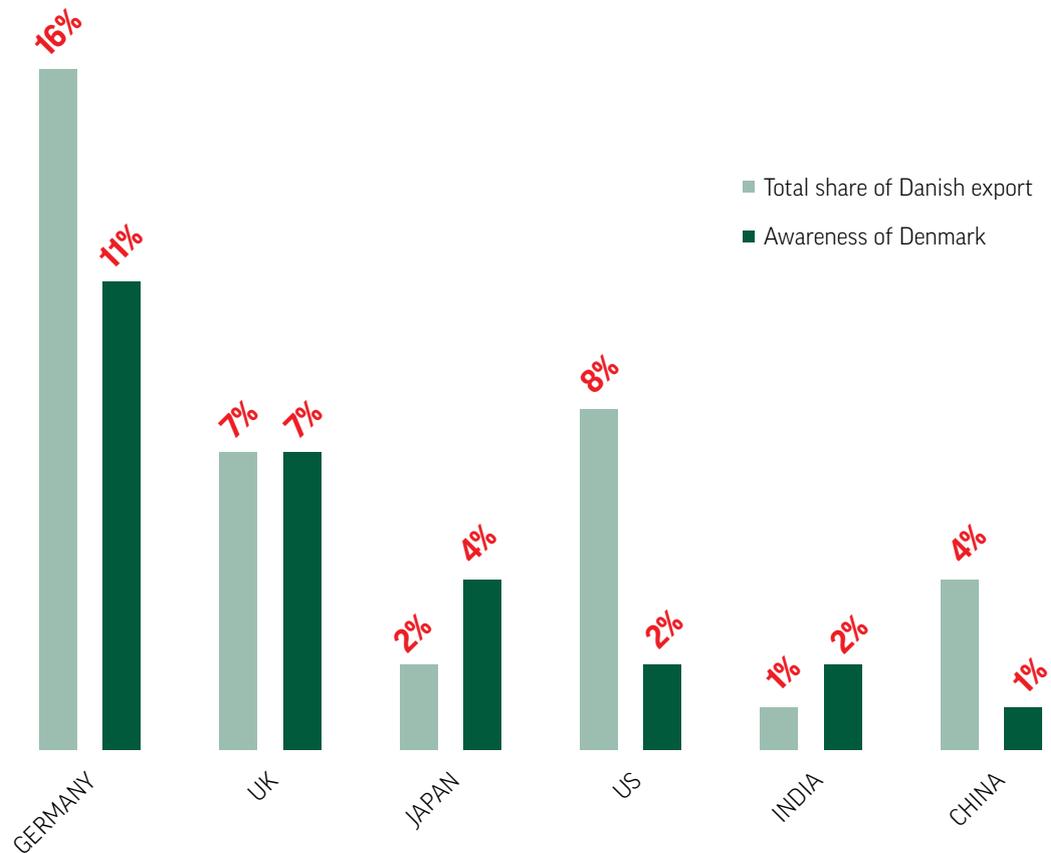
### Top 5 top-of-mind food nations plus Denmark

*Unaided awareness of food nations among decision-makers who participated in the quantitative survey (own market excluded)*



## Unaided awareness of Denmark compared to trade flow

Total share of decision-makers that have mentioned Denmark as a top-of-mind food nation (own market excluded) versus the total share of exports (Statistics Denmark)

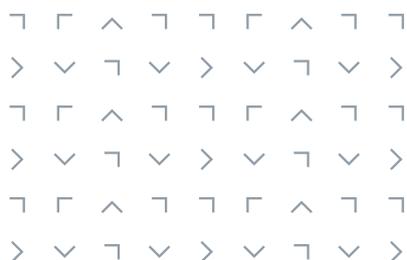


*To increase the market share, the Danish food cluster should strengthen the decision-makers' knowledge of Denmark and Danish agriculture and food products and solutions. It is all about strategic communication and patience.*

*Erik Elvingsson Hedén, CEO, SB Insight*

According to Erik Elvingsson Hedén, sustainable branding expert and chief executive officer at the consultancy firm SB Insight, Denmark is known for several unique selling points (USPs), but the relatively limited brand awareness of Denmark as a food nation suggests that several USPs are not utilised enough.

Brand awareness takes time to develop and demands trustworthy strategic communication and patience, he adds. This requires the use of various communication disciplines over a long-term period. To begin with, branding messages should be broad and communicated via several channels. When brand awareness is established, resources should be invested in establishing a more strategic and specific positioning related to the trends and tendencies relevant to key stakeholders.



### Strong brands of international renown

When asked about Denmark specifically, most international decision-makers have a positive perception. Almost half see Denmark as a leading food and agricultural nation, and 57% say Denmark is known for strong food and agricultural brands.

However, there is significant variation in attitudes from country to country. For example, 60% of Chinese decision-makers perceive Denmark as a leading food nation compared to just 35% in the US. Similarly, 69% of Indian decision-makers believe Denmark is known for strong brands, while only 39% of US respondents share that opinion.

On average, 29% of decision-makers say they do not know much about Danish food and agriculture products and solutions. This includes many respondents from the two neighbouring markets Germany and the UK – contradicting their relatively high ranking of Denmark as a top-of-mind food nation at 11% and 7% respectively.

The positive ranking could rest on the long trading history and general image of Denmark as a trustworthy and reliable neighbouring market rather than knowledge of Danish food and agriculture products and solutions. It is clear, though, that there is huge growth potential for Danish producers if brand awareness is strengthened.

According to Hanne Søndergaard, executive vice president and chief marketing officer at Arla Foods, consumer trust in products and solutions is a prerequisite for achieving greater awareness and a stronger image. That both takes time and puts huge demands on company resources.

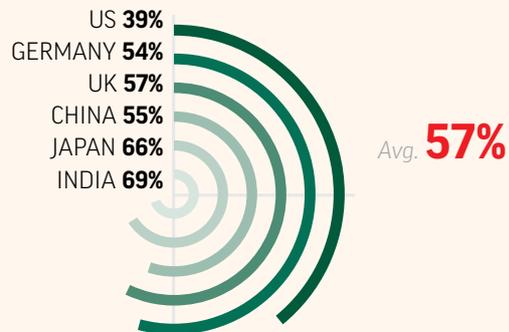
“*Building awareness and a trustworthy image requires patience and a long-term perspective. There is no quick fix for getting a strong market position.*

Hanne Søndergaard, EVP & CMO, Arla Foods

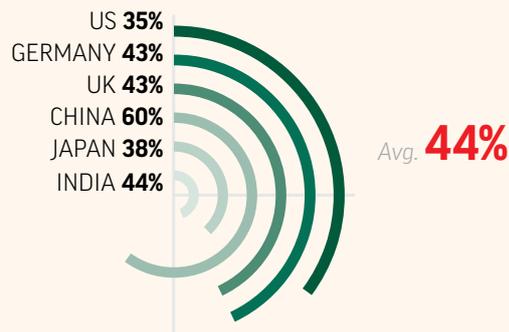
### How international decision-makers perceive Denmark

Decision-makers in each country who strongly agree or agree with the three statements

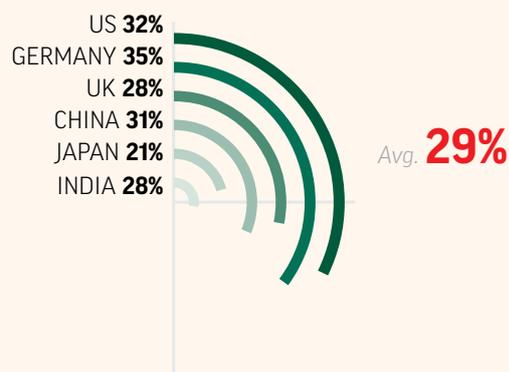
“Denmark is known for strong brands.



“Denmark is a leading food and agricultural nation.

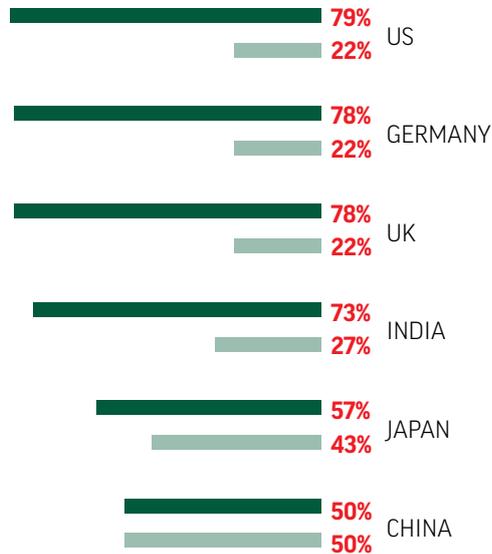


“I don't know much about Danish agriculture, food products or solutions.



### Unaided awareness of food-producing countries

Total share of decision-makers that mention their own country when asked about top-of-mind food nations



- Decision-makers who mention their own country
- Decision-makers who only mention other countries

### Domestic products are the biggest competitor

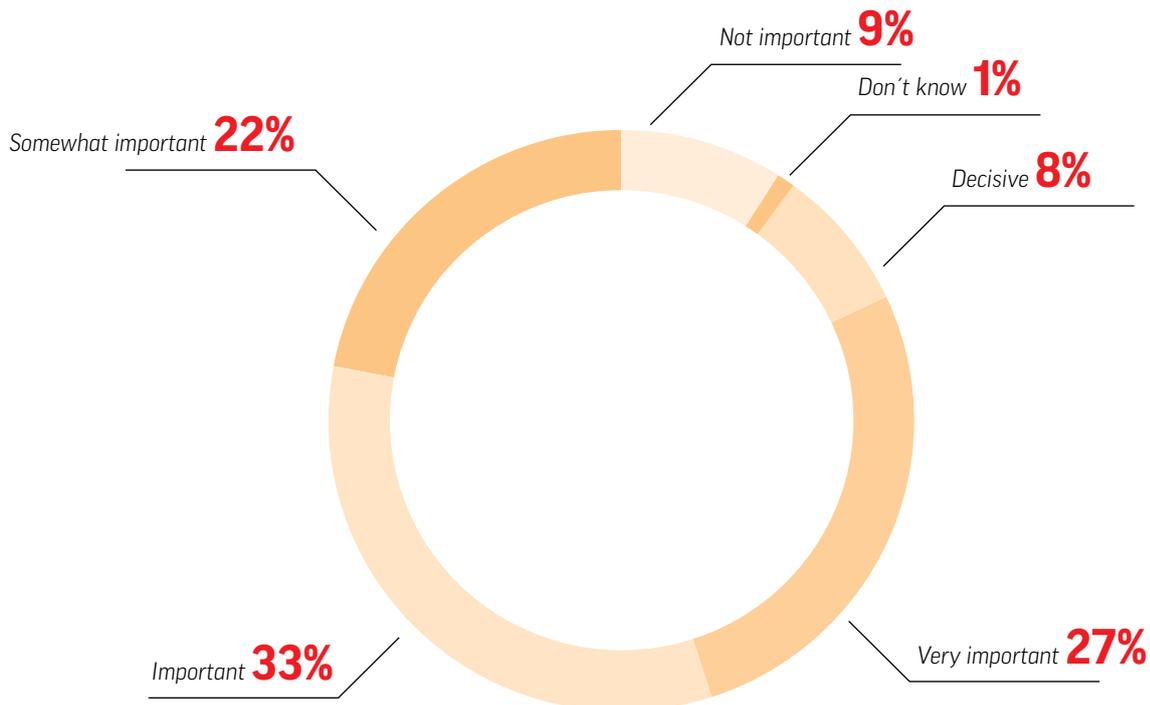
In all six selected countries, domestic products and solutions are the biggest competitor that Danish food and agricultural exports face. Home bias is particularly evident in the UK, Germany, the US and India, where approximately three-quarters of decision-makers mention their own country as a top-of-mind food nation. In Japan and China, around half of decision-makers mention their own country.

### Country of origin is important to most decision-makers

Country of origin is important to 68% of international decision-makers when choosing a food product or supplier of food solutions. Only 9% are unconcerned about where their products and solutions come from.

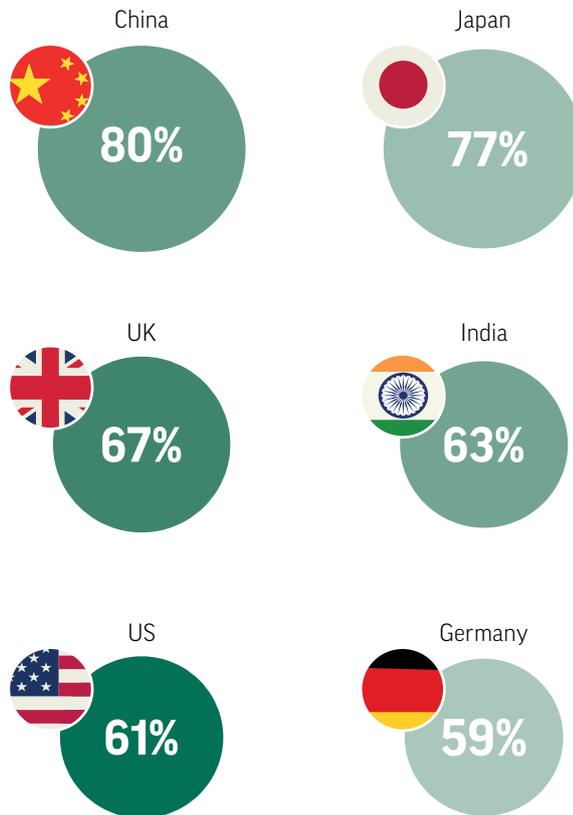
Chinese and Japanese decision-makers are particularly focused on country of origin. Although less important to German and US decision-makers, it is still a factor when choosing suppliers of food and agricultural products or solutions. However, the importance may vary depending on whether a supplier produces for end-users or the business-to-business sector.

### Importance of country of origin to international decision-makers overall



## Importance of country of origin by country

The share of decision-makers in each country that consider country of origin to be of decisive importance, very important or important when choosing a supplier/source of food and agricultural products or solutions

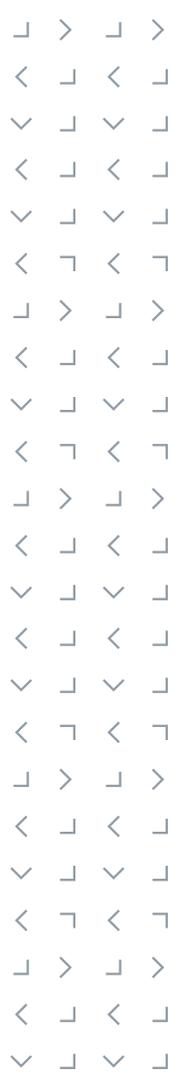


“*The combination of world-renowned Danish design, innovative packaging solutions and sustainability creates competitive benefits. By highlighting that your products are sold in Denmark, you demonstrate that you meet the highest standards, improving your international market position.*

*Christian Stadil, CEO, and owner of THORNICO*

According to Christian Stadil, chief executive officer and owner of THORNICO, Denmark is widely recognised as an innovative and sustainable country. For this reason, there is a huge growth potential for Danish food companies that use nation branding, especially in a strategic, online marketing context. The precondition for securing a stronger marketing position is trustworthy storytelling that recounts the company's focus on all parts of the value chain.

This implies that companies that supplement their communication with the Danish food and agricultural sector's unique selling points help to overcome home bias and build the image of a trustworthy and reliable country of origin.



## CASE:

# Country of origin supports a strong sales pitch

Danish producer of fruit and vegetable-based products Fynbo Foods makes active use of Denmark's unique selling points when exporting to more than 30 countries on six continents. In fact 'Denmark' has been a strong sales and marketing message for years – especially in countries outside Europe.

The experience is that the further away from Denmark you get, the more effective “Made in Denmark” becomes as a branding tool.

Country-of-origin branding has brought particularly good results for Fynbo Foods in Asia. In South Korea, for example, Denmark is often ranked higher on quality and naturalness than other countries.

### **Adapting the brand to local markets**

Strong communication about Denmark's unique selling points, such as high quality and organics, has strengthened Fynbo Foods' focus on making its products stand out from the local competition. The company has also adapted its branding and communication strategy to local cultural and market needs.

Through these efforts, Fynbo Foods has successfully overcome the tendency among decision-makers to prefer domestic products. Such home bias is one of the biggest competitive challenges that Danish food producers face.

In recent years, Fynbo Foods has experienced a positive change in Asian markets, where decision-makers previously looked towards countries like the US. Now, they are thinking more about Europe. The growing interest in natural products and health is helping to make Denmark top of mind.

**Case:** Based on an interview with CEO, Richard Fynbo, Fynbo Foods



### “**Fynbo Foods' best export advice:**

*Think about what makes you unique and don't underestimate differences in local culture.*

**Core business:** Jams and other fruit and vegetable-based products  
**Primary export markets:** Nordic countries, Asia and the US



## CASE:

# Nation branding with a local competitive edge

Denmark has a strong national brand, but that alone will not bring success when building product sales in an export market – particularly if the main competitor is a local company with a similar product. According to Danish cookie producer Danisa, the key to overcoming home bias is to assess local market needs and opportunities and then adjust the marketing strategy to match.

Danisa has made it a priority to understand the differences between markets before launching a new campaign. Using this insight, the company can identify which Danish strongholds bring most value to a specific market – and are most likely to boost sales.

### **Making an impact with quality, food safety and organics**

In Danisa's experience, the Danish strongholds with the biggest impact on local brand competitiveness are quality, food safety and organics. Outcomes are even better when communication about the strongholds is combined with 'Made in Denmark' or the Danish flag on product labels. Danisa also draws on Danish historical and cultural heritage, sports or celebrities that are known or popular in a given market.

Today, Danisa exports to more than 40 countries on all continents, applying a locally adapted marketing strategy in each. In China and other markets in Asia where Denmark has a positive image, nation branding has proven particularly effective.



### **Danisa's best export advice:**

*Make sure the market you want to enter is motivated to buy your product. Conduct thorough market research, follow the market dynamics and stay up to date with trends and tendencies.*

Overall, Danisa has found that the long-term benefits of nation branding outweigh any short-term risks. Denmark has a strong international brand and that's a big plus when capturing a local market share.

**Case:** Based on an interview with CEO, Erik Bresling, Danisa

**Core business:** Butter cookies based on high quality, natural ingredients  
**Primary export markets:** China, Southeast Asia and the US





# UNIQUE

# UNIQUE SELLING POINTS

## Danish strongholds are valuable assets

International decision-makers highlight a series of attributes, which are at the heart of Denmark's positive image as a leading food nation. Quality, sustainability and food safety are the top three, closely followed by reliability, low environmental impact and trustworthiness. Together, they create a strong foundation for expanding food and agricultural exports and building awareness of the Danish brand.

### Quality and food safety score highest in Asia

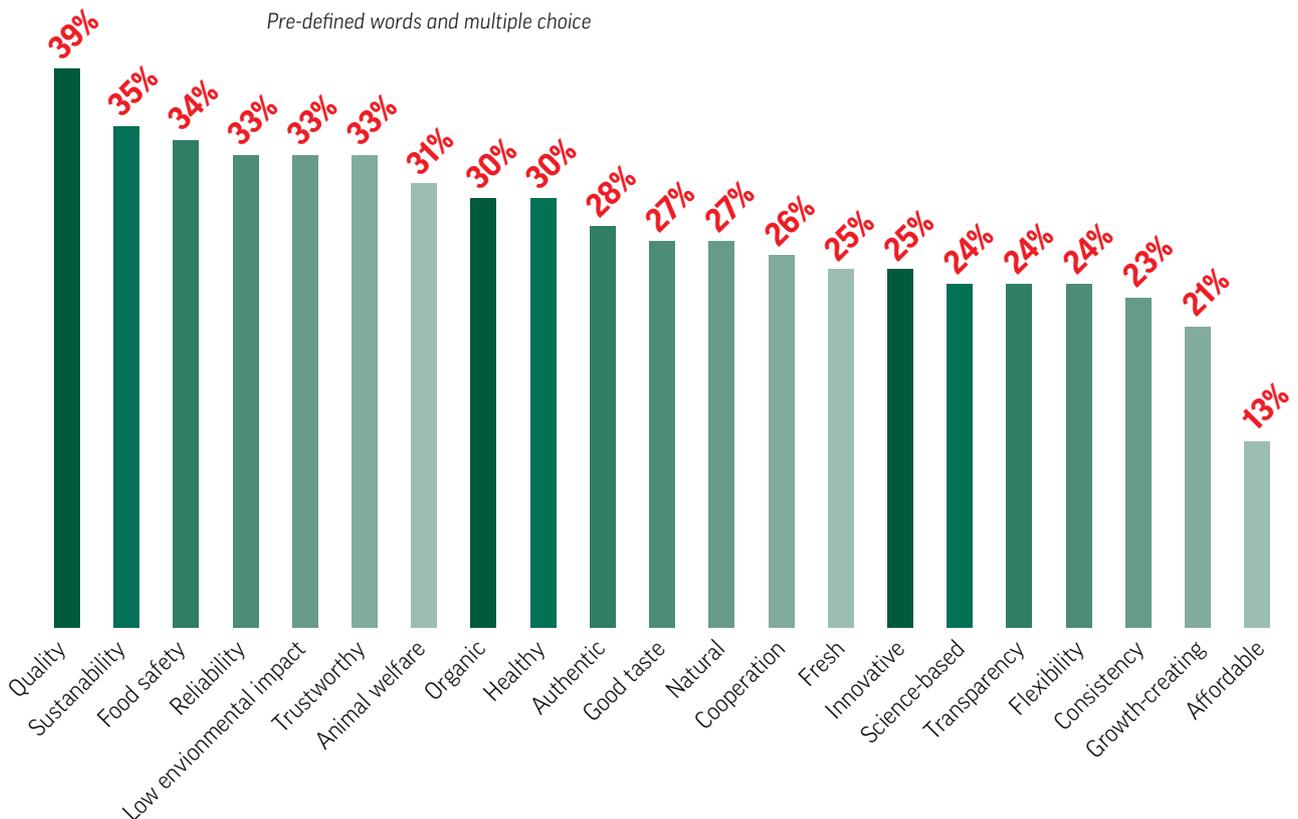
Two out of three decision-makers consider Danish food and agricultural products to have a high level of quality and food safety. In China, Japan and India, as many as 80% share this perception, while only half of US decision-makers are of the same opinion.

Here it is important to note that the word quality may be associated with a variety of aspects, depending on the market. In some markets, there is a close link between quality and food safety. Elsewhere, decision-makers talk about quality in terms of taste or environmental impact. It is important to understand these differing perceptions in order to reach local decision-makers in the right way when communicating about these strongholds.

**70%**  
of decision-makers believe food and agricultural products from Denmark are high quality

### Attributes that international decision-makers associate with Danish food and agricultural exports

*Pre-defined words and multiple choice*





“Working closely with the Danish authorities, the Danish food cluster has achieved remarkable results when it comes to improving agricultural and food production. Reducing salmonella and campylobacter and minimising the use of antibiotics are among the major milestones.

Esben Egede Rasmussen, former executive director, The Danish Veterinary and Food Administration

### Denmark’s food and agricultural industry is known for high quality and food safety standards

Decision makers who agree or strongly agree that Danish food and agricultural products and solutions have a high degree of quality or food safety



**69%** of decision-makers believe food and agriculture products from Denmark have a high degree of food safety

According to Esben Egede Rasmussen, former executive director at the Danish Veterinary and Food Administration, Danish companies have a long tradition for focusing on high quality and safety throughout the value chain – and they are ambitious. Thanks to their evidence-based, systematic way of working, they have produced results that are widely recognised around the world.

The continuing focus on quality and safety improvements relates to Denmark’s reputation as a reliable and trustworthy nation.

### The place to find a reliable partner

Reliability is important in international trade. So, it is encouraging to find that 33% of decision-makers associate Danish food and agriculture exports with reliability and trustworthiness (p.19) – and almost half agree that Danish trading partners are among the most reliable. That is especially true of decision-makers from China and Germany.

### Not cheap – but good value for money

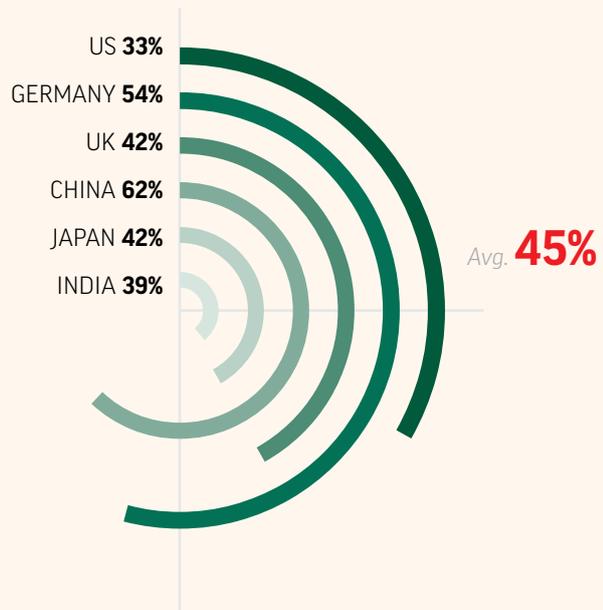
Affordability is a characteristic that few international decision-makers associate with Denmark. Particularly remote markets, such as China and India, regard Danish products and solutions as safe and high quality – but expensive. However, 44% of decision-makers overall state that Danish exports are good value for money.

Companies can reinforce and consolidate this image by continuous communication about the premium quality and other positive attributes that create added value for trade partners. If convincingly conveyed, messages of this kind will eventually make price comparisons with domestic products irrelevant.

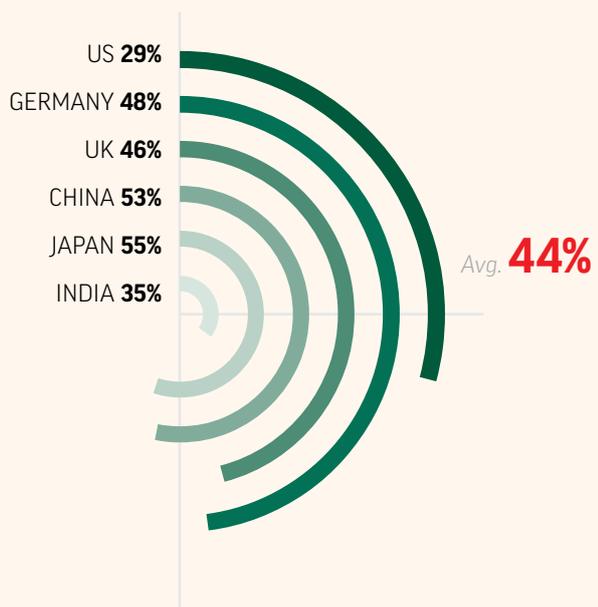
## How international decision-makers perceive Denmark

Decision-makers in each country who strongly agree or agree with the two statements

“ In general, trading partners from Denmark are more reliable than trading partners from other countries.



“ Products and solutions from Denmark are good value for money.



### Top five attributes for international decision-makers

The top five attributes of Danish food and agricultural exports that decision-makers rank higher than products and solutions on their domestic market

- 1 Animal welfare
- 2 Sustainability
- 3 Low environmental impact
- 4 Food safety
- 5 Organic produce

### Five strongholds that win on home markets

International decision-makers generally associate Danish food and agricultural exports with a higher level of animal welfare, sustainability, food safety and organic produce and a lower environmental impact than products and solutions from their own country. These five strongholds are also listed among the top ten attributes shown on page 19.

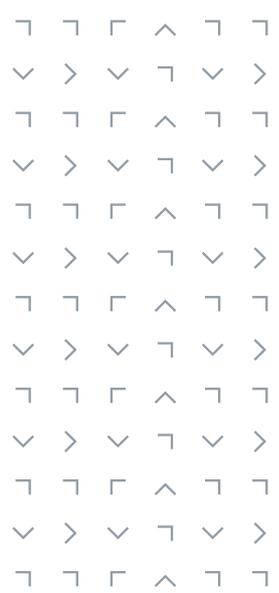
Views vary across the six markets, however. British, Chinese and Indian decision-makers consider animal welfare to be better in Denmark than in their domestic markets, while German decision-makers rate their own animal welfare standards higher. Chinese decision-makers also focus on the low environmental impact and food safety of Danish exports and share a favourable opinion of Danish organic produce with decision-makers in the UK and US. On low environmental impact, US and Japanese decision-makers rank their own products and solutions slightly higher.

According to Hanne Søndergaard, EVP and CMO at Arla Foods, organic produce and sustainable production will be increasingly top of mind for international consumers and political decision-makers in the future. For Danish food and agricultural companies, these trends, along with the established high level of quality, food safety and innovation, represent a major opportunity to win the trust of more global consumers and achieve greater market share.

Denmark's positive reputation within all these strongholds are the food and agricultural sector's most important asset. To compete successfully on the global market, there is a need to keep communicating these strengths to increase brand awareness and future sales.

“I believe many Danish companies underestimate the potential of focusing marketing and branding on the Danish food cluster's historical ability to develop and produce healthy, sustainable and organic food.

Hanne Søndergaard, EVP & CMO, Arla Foods







## CASE:

# Organic reputation opens international doors

Organic meat and animal welfare have been top of the agenda at Friland from the outset in 1992. As a first mover, Friland is one of the companies that has helped build Denmark's reputation as an international leader. Today, that reputation is a key selling point for Friland when opening the door to new markets.

Friland's roots in the Danish cooperative movement, its passionate farmers and the traceability of its products back to individual farms and animals are all key to the corporate brand.

### An organic pioneer

When targeting new markets, the company always remembers to highlight Denmark's pioneering role in the development of the organic category during the late 1980s – not to mention the strong commitment to organic produce and animal welfare for which Denmark is now well known.

Today, Friland is the biggest organic meat producer in Europe, with a strong sales record in many export markets. The company tagline – 'Organic first mover since 1992' – ensures its history as an organic frontrunner reaches all the way to consumers.

### Trustworthy partner

Of course, it takes more than good communication to succeed. A significant factor in the company's success is the high level of customer service it provides all over the world and the ability to respond to the needs and concerns of individual markets which is handled through an export department in Kiel, Germany. North American customers, for example, are particularly in awe of the high level of animal welfare they experience during visits to Friland farmers. This has made Friland a trustworthy partner for many.

**Case:** Based on an interview with CEO, Claus Hein, Friland

“**Friland's best export advice:**  
*Always keep an eye on the details of your supply chain, delivery and service agreements.*”



**Core business:** Organic and free-range pig and cattle production  
**Primary export markets:** Germany, France, Italy, New Zealand, North America

## CASE:

# Reliable egg solutions for more than 80 years

Danish OVODAN has delivered high-quality egg products to food manufacturers and caterers for more than 80 years. Today, OVODAN has production facilities in Germany, South America and China and sales to more than 65 countries.

High food safety and quality standards are paramount in international markets. Thanks to Denmark's good reputation for both, OVODAN has greatly benefited from being a company with Danish roots when approaching authorities and customers, especially in China.

### The challenge of home bias

Recently, though, OVODAN experienced that national campaigns in many markets are encouraging consumers to buy more locally produced foods.

To overcome this home bias and maintain market share, OVODAN stepped up its communications about Danish food quality and safety – along with Denmark's good reputation for reliability. As a result, many customers now prioritise a long-term relationship and loyal service. In Japan, the company's positive reputation has paved the way to new opportunities.

### Uniform solutions – always

OVODAN maintains its strong market position through long cooperation with local distributors and a company history that spans more than eight decades. The years have shown that OVODAN delivers uniform, high-quality egg solutions every time. That is a strong selling point for all its customers.

**Case:** Based on an interview with CEO, Henrik Marinus Pedersen, Ovodan

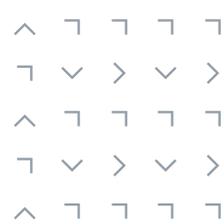
“**OVODAN's best export advice:**  
*Build trust with your customer by delivering as promised. If a problem occurs, grab the heart of the matter and get it resolved.*”



**Core business:** Business-to-business sales of egg products  
**Primary export markets:** Germany, the UK and Japan



# SUSTAIN

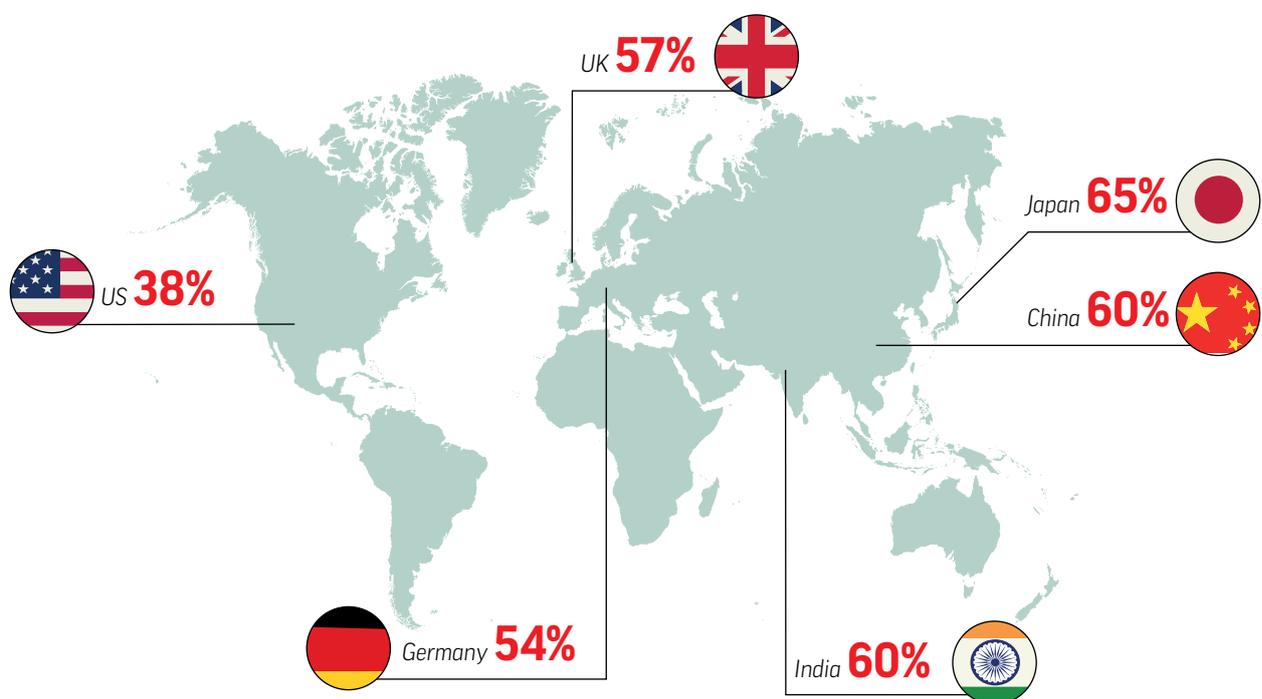


# SUSTAINABILITY

Best in class for sustainable food solutions

## Danish food and agriculture is world-leading within sustainability

The share of decision-makers in each country that strongly agree or agree with the statement that Danish food and agricultural products and solutions are among the most sustainable in the world



The Danish food and agricultural sector has long been at the forefront when it comes to sustainable products and solutions. The survey's findings reflect the positive effect on export markets. More than half of the surveyed decision-makers - 55% - agree or strongly agree that Denmark is one of the world's most sustainable food nations.

Almost all decision-makers rank Denmark higher on sustainability than their own domestic market. China, the UK and India are particularly positive. Only German decision-makers award their home products a higher sustainability ranking.

The surveyed decision-makers see a strong connection between long-term growth and sustainable food products and solutions. While 83% expect sustainability to become more important to their company in the future, 69% consider sustainability crucial to long-term growth.

Only 13% of respondents consider sustainability to be irrelevant. This contrasts with the 67% who prefer to trade and collaborate with companies that focus on sustainability. A solid 64% say their customers are stepping up demand for more sustainable solutions.

“Consumer demand for more sustainable solutions is huge, with a demand for higher quality in all parts of the value chain. This is increasing the willingness to pay a higher price. The market is far from saturated with sustainable solutions, so Danish companies should utilise this opportunity even more.

Christian Stadil CEO and Owner of THORNICO

### More important than price

The importance of trading sustainable products and solutions is growing. According to 44% of decision-makers, sustainability is now more important than price. Sustainability will clearly play an even more prominent role in future international trade and collaboration.

According to Christian Stadil, chief executive officer and owner of THORNICO, agricultural companies embrace the new trends and strengthen the sustainability messages in their branding. The increased focus on food quality gives Danish food companies an even better starting point for expanding sales in the future.

### How international decision-makers view sustainability

All six markets have a positive attitude towards sustainability. Decision-makers in Japan, India and the UK are, however, more positive than decision-makers in Germany. Chinese decision-makers also state that their customers do not demand sustainable solutions to the same extent as decision-makers from other countries. For this reason, marketing campaigns in China should focus on other high-ranking strongholds, such as quality and food safety, and specify exactly what sustainability means when presenting sustainable solutions. According to both German and Chinese respondents, price and other trading parameters are still very important when doing business abroad. Interestingly, 20% of UK decision-makers note that sustainability is not relevant to their company, even though 85% of them believe it will become more important in the coming years.

The results show the sustainability agenda will become even more important in the future. The question is: who will be responsible for driving it?

According to Erik Elvingsson Hedén, CEO at SB Insight, companies could benefit from communicating more about how their products and solutions contribute positively to the United Nation's 17 Sustainable Development Goals (SDGs). To have a clear message, his advice is to focus on just one or two strongholds that support the SDGs and include both internal and external stakeholders in reaching the chosen SDG targets. He also comments that it is more important to highlight the process than the result, as sustainability is a long-term journey.

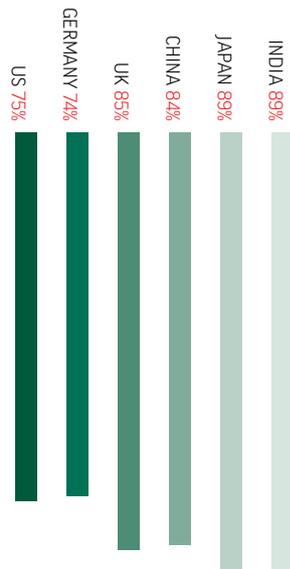
“Sustainability first and foremost expresses a visionary ambition and that you are constantly working in a sustainable direction with ambitious goals. Transparency about targets – both internal and external – is essential.

Erik Elvingsson Hedén, CEO, SB Insight

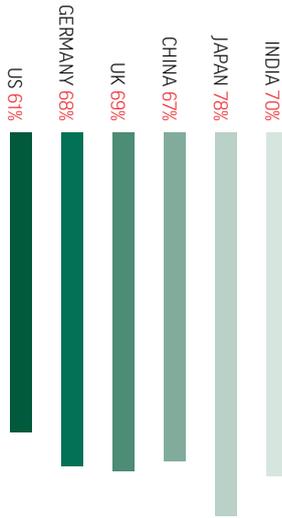
## How international decision-makers view sustainability

The share of decision-makers in each country who strongly agree or agree with the given statements

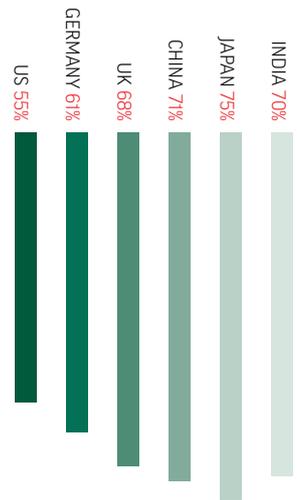
Avg. **83%**  
 “Sustainability will become more important to my company in the coming years.”



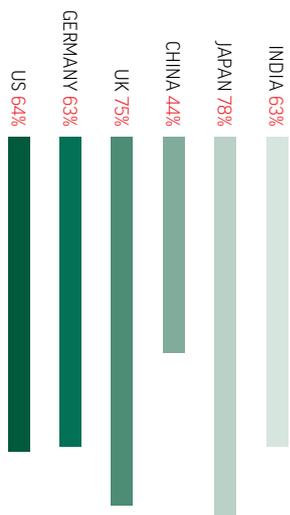
Avg. **69%**  
 “As a company, having sustainable products and solutions is necessary to secure long-term growth.”



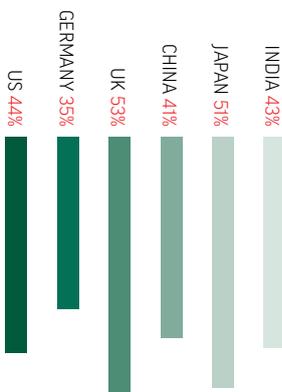
Avg. **67%**  
 “We prefer to trade and collaborate with companies that focus on sustainability.”



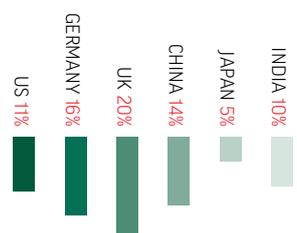
Avg. **64%**  
 “My company’s customers are demanding more sustainable solutions.”



Avg. **44%**  
 “Sustainability is more relevant than price (or other trading parameters).”



Avg. **13%**  
 “Sustainability is not relevant to my company.”



## A collaborative effort is crucial

In the opinion of 58% of decision-makers, companies are the main drivers of more sustainable solutions overall. At the same time, around one in four point to governments and politicians as primarily responsible. A successful green transition will depend on close collaboration between the food cluster and the authorities.

Esben Egede Rasmussen, former executive director at the Danish Veterinary and Food Administration points out that the Danish food and agricultural sector's collaborative mindset – between companies, authorities and research institutions – is key to delivering solutions to current and future challenges. Born of the cooperative movement and strong business organisations, such collaboration secures joint agreements on ambitious, long-term goals. Danish pragmatism contributes to trustworthy and well-functioning working relations between businesses and authorities.

The Danish approach towards collaboration gives a competitive advantage when meeting sustainability demands.

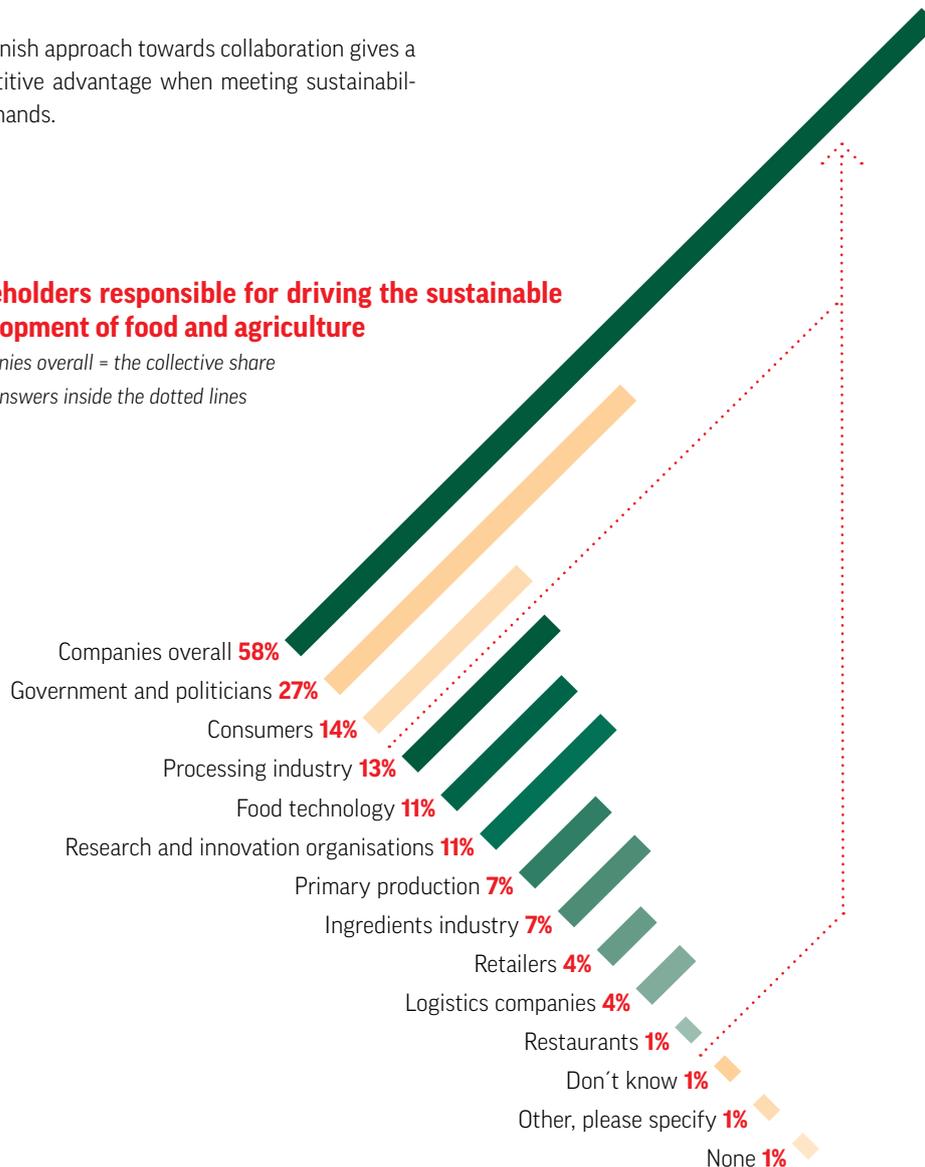


*Close collaboration, a high degree of trust and a focus on producing more with less are key characteristics of the Danish food cluster.*

*Esben Egede Rasmussen, former executive director, Danish Veterinary and Food Administration*

## Stakeholders responsible for driving the sustainable development of food and agriculture

*\*Companies overall = the collective share of the answers inside the dotted lines*





### Driving the green transition throughout the value chain

Several changes in today's behaviour and processes will be necessary to drive the green transition. According to the surveyed decision-makers, long-term sustainable development depends on the initiatives listed on the opposite page.

All these initiatives are essential to achieving global sustainability goals. The Danish food and agricultural sector holds a strong position with regard to each one. In other words, Danish companies can make a positive contribution throughout the value chain – from farm to fork.

According to Erik Elvingsson Hedén, CEO at SB Insight, a holistic, value-chain perspective is important when communicating about company contributions to the sustainability agenda. This ensures the broadest possible group of potential customers will recognise the advantages of each product or solution.

Hanne Søndergaard, EVP and CMO at Arla Foods, emphasises the need for sustainable solutions to be financially viable.

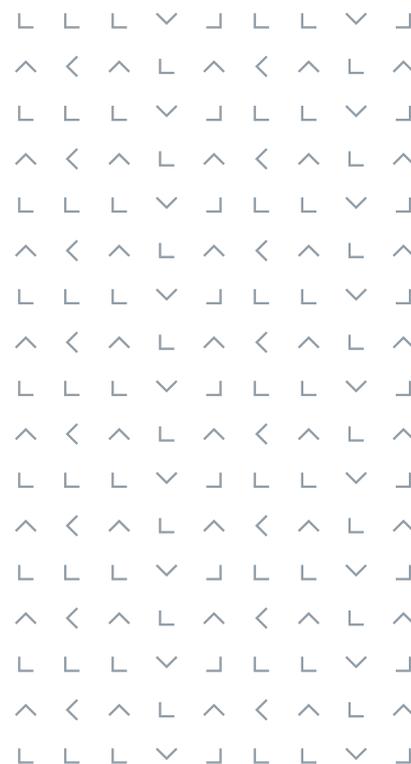
A stronger market position requires that all parts of the Danish food cluster contribute to developing the overall 'cluster eco-system' – through an increased focus on innovation and digitalisation, improved agility and more knowledge-based collaboration throughout the value chain.

“Increased investments in sustainability while increasing productivity and strengthening innovation power - these are investments in the future of the food cluster.

Hanne Søndergaard, EVP and CMO, Arla Foods

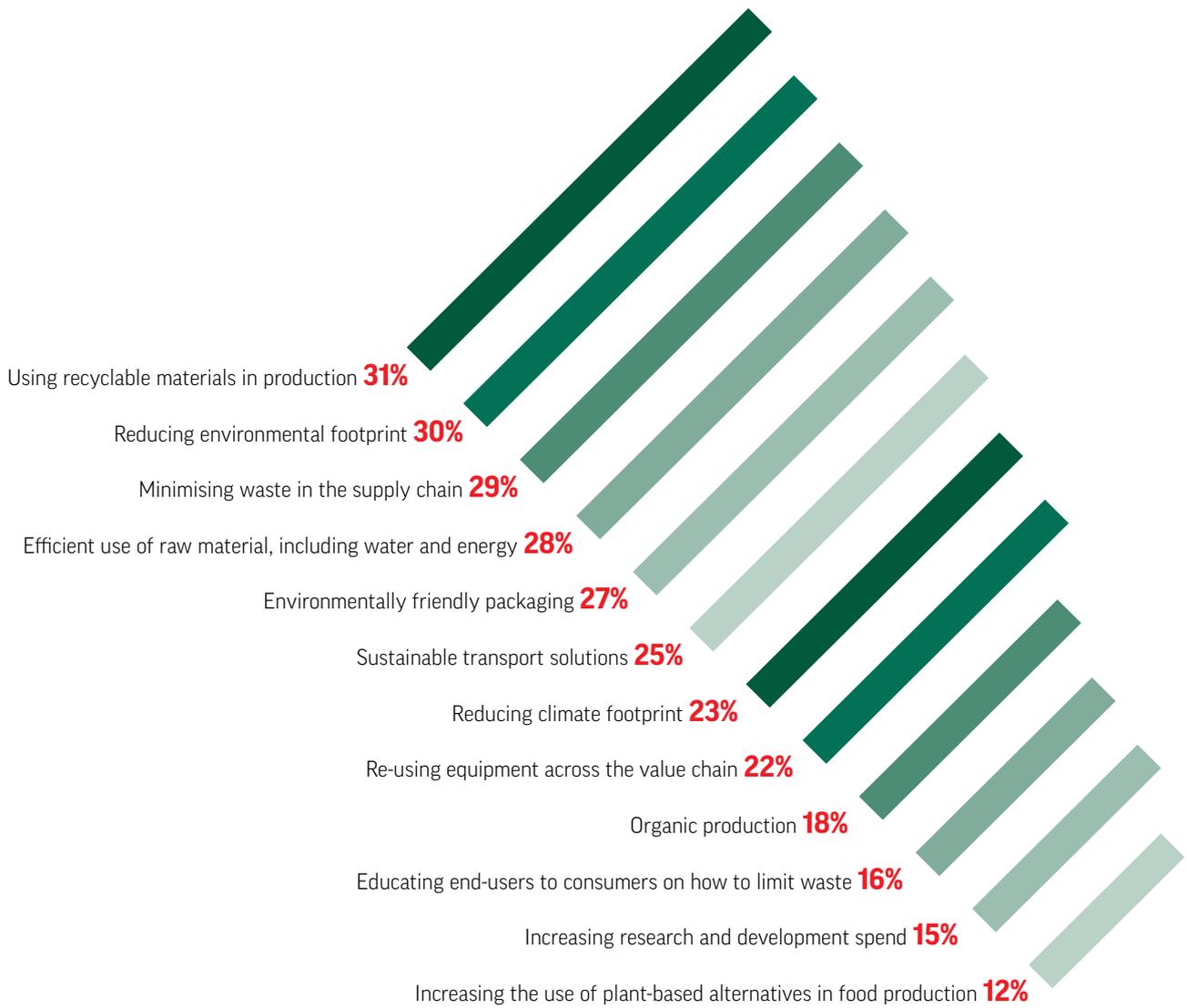
“The window of opportunity is small, and the competition for capturing attention on the global scene is becoming increasingly fierce. Brand messages should be communicated often and included in an overall framing.

Erik Elvingsson Hedén, CEO SB Insight



## Initiatives with greatest impact on sustainable development

Total share of high-impact initiatives for driving sustainable development



*Due to COVID-19, all markets have experienced a massive setback, and the world economy has been left in a very fragile condition. The focus on cost reduction will sharpen the demands on a productive food nation like Denmark. Continuous productivity improvements are crucial for the Danish food cluster to maintain and strengthen sales of sustainable food globally.*

*Hanne Søndergaard, EVP and CMO, Arla Foods*

## CASE:

# Sustainable management from pineapple to bottle

Orana launched its first CSR policy in 2007 and sustainability has always been at the heart of the company. With the adoption of the UN Sustainable Development Goals in 2015, the Danish supplier of fruit based raw materials started a journey using sustainability as a management tool, and actively involving its entire organisation in the work around achieving the goals.

Today, Orana is in the process of implementing sustainable management throughout its organisation, including factories in Denmark, Egypt, India and Vietnam.

### **Building a long-term competitive advantage**

Although quality, price and delivery capability are still the highest priorities in Asia, where Orana has some of its largest markets, the company has made the SDGs part of its DNA. Orana believes this will be a strong competitive advantage when the SDGs become better known and more established and established in these markets.

The commitment to sustainability is visible at several levels. All employees receive regular training in how to contribute to sustainable development and why factory initiatives focus on reducing water consumption and improving waste management, for example. The training also highlights the returns on investment – and why working with sustainability is a good opportunity for business.

“**Orana’s best export advice:**  
*Describe how you are contributing to the SDGs and be ahead of customer needs within sustainability, even though the returns may not be immediate.*”

### **Visible branding online and offline**

Branding and communication activities are similarly dedicated to spreading the word about the SDGs. On the website and at trade shows, sustainability plays an important part, attracting the interest of customers from all over the world – even those who do not have sustainability on their own agenda.

One example of how Orana integrates the SDGs in the whole value chain can be seen at their factories. Regardless of the country, Orana always aims to make a positive contribution to the local community. That could be by offering local jobs to help reduce poverty and ensuring a good working environment that matches Danish standards.

**Case:** Based on an interview with Director Food Service, Mette Ring O'Donnell, Orana

**Core business:** Fruit-based raw materials for the food industry and food service products  
**Primary export markets:** Middle East, Asia, India and Europe

## CASE:

# Documented sustainability builds a stronger company

Global bioscience company Chr. Hansen is fully aligned with the 69% of international decision-makers in this report who consider sustainable products and solutions necessary for long-term growth. Hailed the world's most sustainable company in 2019, Chr. Hansen experiences growing customer demand for solutions that contribute to sustainable development.

Sustainability has always been part of Chr. Hansen's core business. In the face of the rising global focus on phasing out certain pesticides, reducing antibiotic use and minimising food waste, sustainability communication aimed at customers has become increasingly important in recent years.

### Strategic implementation of the UN Sustainable Development Goals

When the UN launched the 17 Sustainable Development Goals (SDGs) in 2015, Chr. Hansen gained an international platform for its existing sustainability work. The goals are both simple to understand and include 169 sub-goals that guide companies when taking concrete actions.

Chr. Hansen has chosen to pay extra attention to the three SDGs where the company believes it can contribute the most: no. 2 - zero hunger, no. 3 - ensure healthy lives and promote wellbeing for all at all ages and no. 12 - responsible consumption and production.

After choosing these strategic lighthouses, Chr. Hansen mapped their almost 3500 products against the three SDGs, seeking scientific documentation which was then verified. The company ideology is that only SDG contributions backed by scientific documentation may be used in branding messages.

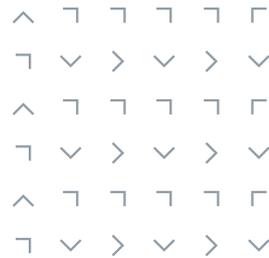
### Data-based documentation reinforces the narrative

The use of this methodology has made the SDG communication easier and more relatable across the whole organisation. It was also one of the reasons why Chr. Hansen was named world's most sustainable company by the sustainable business magazine, Corporate Knights.

By making sustainability a clear objective, Chr. Hansen has been able to use it actively in direct communication with customers and other stakeholders to drive change.

**Case:** Based on an interview with Senior Director, Corporate Affairs, Annemarie Meisling, Chr. Hansen

“**Chr. Hansen's best export advice:**  
*Get insights to where your customer is in their sustainable transition to unfold the opportunities for collaboration.*”



**Core business:** Natural improvement of food and health  
**Primary export markets:** China, US and Europe



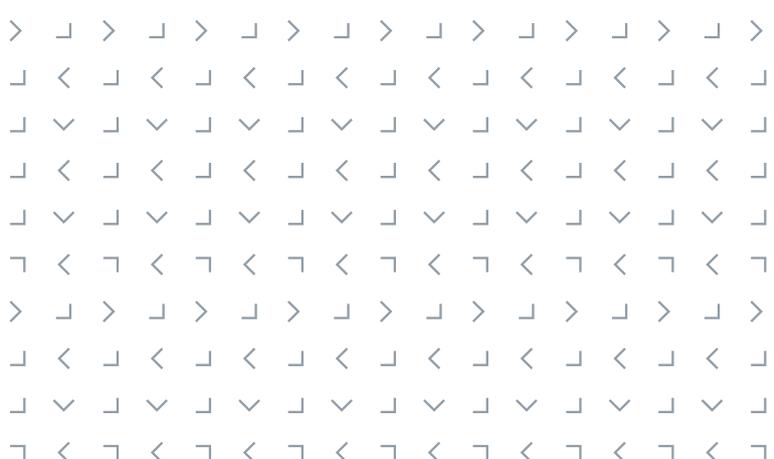
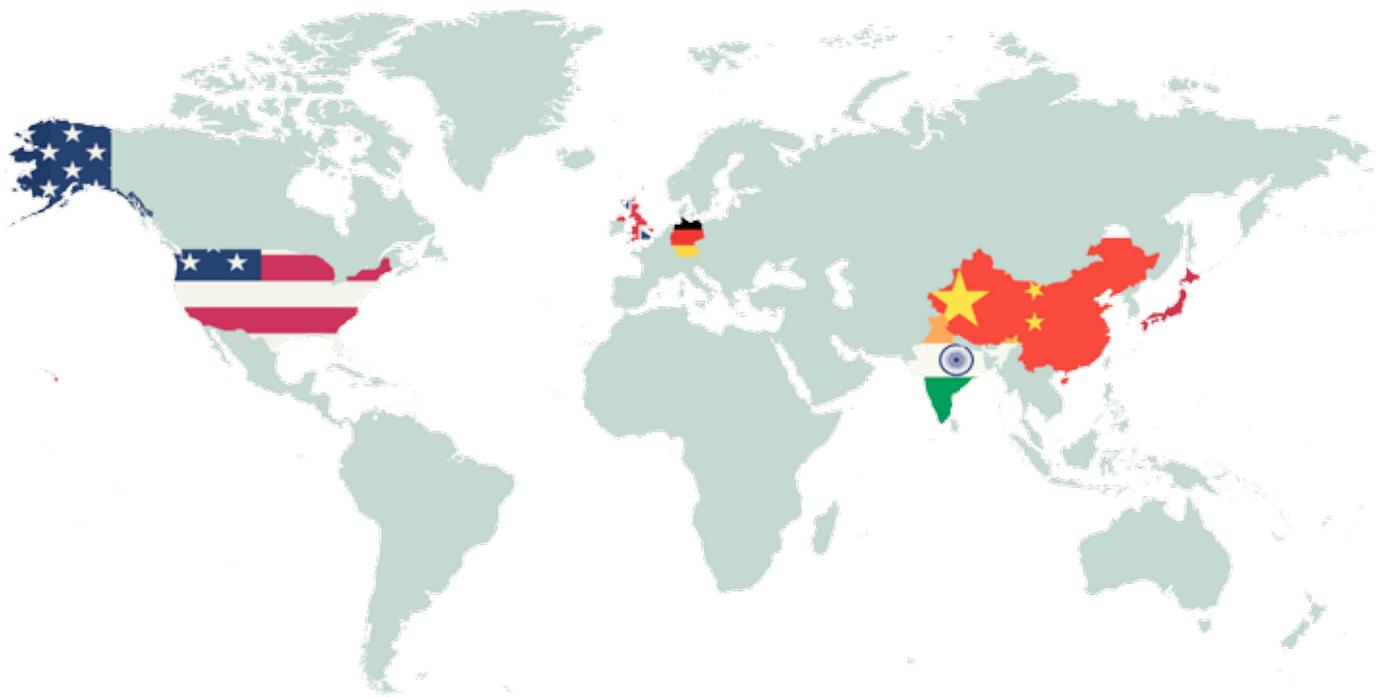


# MARKET

# MARKET DEEP DIVES

Decision-makers from six important export markets hold a range of views about Denmark as a food nation. Knowledge of these views contributes to a strong sales dialogue that can support Danish companies reach their full export potential.

The market deep dive is a guiding tool and collection of the market specific key findings, export statistics and suggestion on what to focus on in your sales and marketing activities.





# THE UNITED STATES

Market deep dive

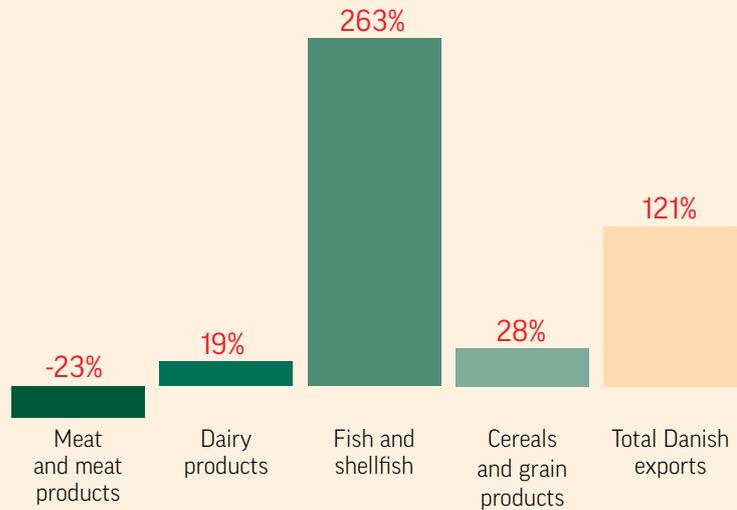
## Trading with the US

In 2019, the US became Denmark's largest export market for goods and services overall (Statistics Denmark, 2019). Within the Danish food and agricultural sector, US has grown in importance as a trading partner over the past decade, particularly in the fish and shellfish category.

Exports of agricultural machines grew almost 40% from 2017 to 2018, while exports of food industry machinery declined around 5%.

In 2018, machine exports to the US food and agricultural sector totalled approximately DKK 1 billion. (Danish Agriculture & Food Council 2019)

## Export development 2010-2019

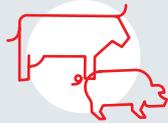


(Statistics Denmark)

## Total Danish exports of goods

DKK **76**  
billion

Meat and meat products



DKK 678 million

## Exports of food and agricultural goods 2019

Dairy products



DKK 395 million

Fish and shellfish



DKK 613 million

Cereals and grain products



DKK 334 million

## Danish strongholds - organic, animal welfare and sustainability

Compared to US products and solutions, Denmark ranks higher for organic, animal welfare and sustainability, although, as in many other countries, the US decision-makers prefer domestic products over imports. For 61% of the US decision-makers, the country of origin is of decisive importance, very important or important. Hence, they choose a supplier or business partner from a country they trust.

46% of the US decision-makers agree that agricultural and food products from Denmark are both high in quality and have a high food safety standard, while 39% agree that Denmark is known for strong brands. Another 38% consider Danish agriculture and food products and solutions to be among the most sustainable in the world.

Despite being the no. 1 market for Danish exports, unaided awareness of Denmark as a food nation is low in the US. Efforts should be made to drive awareness. The following five attributes should be in focus:

## Top five attributes for US decision-makers

When producing, purchasing, selling or handling food and agricultural products and solutions, the following five attributes are important to US decision-makers

**37%**  
Food safety



**37%**  
Sustainability

**36%**  
Low environmental impact



**35%**  
Quality

**34%**  
Organic



## Sustainability tendencies according to US decision-makers

- 75%** | Sustainability will become more important to our company in the coming years.
- 64%** | Our customers are demanding more sustainable products.
- 61%** | It is necessary to have sustainable products to secure long-term growth.
- 56%** | Private companies are responsible for driving sustainable development.
- 55%** | We prefer to buy and collaborate with companies that have a focus on sustainability.
- 44%** | Sustainability is more relevant than price or other trading parameters.
- 38%** | Danish food and agricultural products and solutions are among the most sustainable in the world.

### Drivers of sustainable development from a US perspective

**2**  
Using recyclable materials in the production

**1**  
Sustainable transport solutions

**3**  
Re-using equipment across the value chain

### Business opportunities in the United States

Three business opportunities have been identified for increasing brand awareness and strengthening Denmark's market position in the US:

- > Create brand awareness and overcome home bias by showcasing Danish strongholds – e.g. within organic food and animal welfare – where Denmark stands out compared to US products and solutions.
- > Emphasise the company's contribution to sustainability when promoting products and solutions.
- > Illustrate and communicate actively about the use of sustainable transport solutions by Danish food and agricultural companies.

“Danish companies are popular. And the quality of especially their dairy products is really good. It's excellent.”  
US decision-maker in the restaurant sector

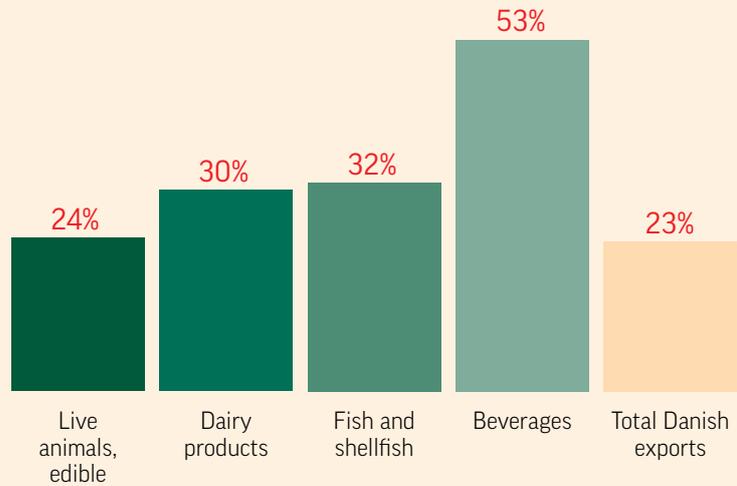


## Trading with Germany

Both as a leading economy and neighbour, Germany has been one of Denmark's key trading partners for decades. Over the past ten years, food sector exports to Germany have increased within all major product categories.

From 2017 to 2018, Danish exports of agricultural machinery, for example, increased by 20% (DKK 117 million) to a total of DKK 688 million. (Danish Agriculture & Food Council 2019)

### Export development 2010-2019

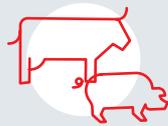


(Statistics Denmark)

### Total Danish exports of goods

DKK **104**  
billion

#### Live animals, edible



DKK 4.3 billion

### Exports of food and agricultural goods 2019

#### Dairy products



DKK 3.5 billion

#### Fish and shellfish



DKK 3.9 billion

#### Beverages



DKK 2.7 billion

## Danish strongholds - low environmental impact and innovation

Being closely connected, German and Danish products and solutions are generally rated similarly. When compared, Danish products and solutions stand out for their low environmental impact and innovative production. For 59% of German decision-makers, the country of origin is of decisive importance, very important or important. Hence, they choose a supplier or business partner from a country they trust.

65% of German decision-makers agree that Danish food and agricultural products have a high food safety standard, while 66% agree that quality is high and 54% that Denmark is known for strong brands. 54% perceive Danish food and agricultural products and solutions as being among the most sustainable in the world.

German decision-makers tend to prefer their own country's products and solutions over imports. There is, though, relatively high awareness of Denmark as a food nation. To strengthen this position, the following five attributes should be in focus:

## Top five attributes for German decision-makers

When producing, purchasing, selling or handling food and agricultural products and solutions, the following five attributes are important to German decision-makers:

**32%**  
Quality



**25%**  
Healthy

**23%**  
Organic



**21%**  
Innovative

**20%**  
Reliable



## Sustainability tendencies according to German decision-makers

“Many restaurant customers are starting to ask for sustainable products, less plastic and more natural products. And they are willing to pay more for it, because everyone knows that it’s more expensive to make it sustainable.  
German decision-maker in the restaurant sector

- 74%** | Sustainability will become more important to our company in the coming years.
- 68%** | It is necessary to have sustainable products to secure long-term growth.
- 63%** | Our customers are demanding more sustainable products.
- 61%** | We prefer to buy and collaborate with companies that focus on sustainability.
- 54%** | Danish food and agricultural products and solutions are among the most sustainable in the world.
- 45%** | Private companies are responsible for driving sustainable development.
- 35%** | Sustainability is more relevant than price or other trading parameters.

### Drivers of sustainable development from a German perspective

**2**  
Environmentally friendly packaging

**1**  
Reduced environmental footprint

**3**  
Efficient use of raw materials, including water and energy

### Business opportunities in Germany

Three business opportunities have been identified for increasing brand awareness and strengthening Denmark’s market position in Germany:

- Leverage and continue to develop Denmark’s position as a driver of high innovation and low environmental impact.
- Communicate the Danish strongholds explicitly, especially within quality and safety, and link them to sustainability.
- Emphasise the use of environmentally friendly packaging and its positive effect on the sustainability agenda.

“The [Danish] market is quite well-organized. Producers and farmers are well-trained and have good knowledge. ... Educated means to me that farmers behind know how to produce [the product].  
German decision-maker within raw materials

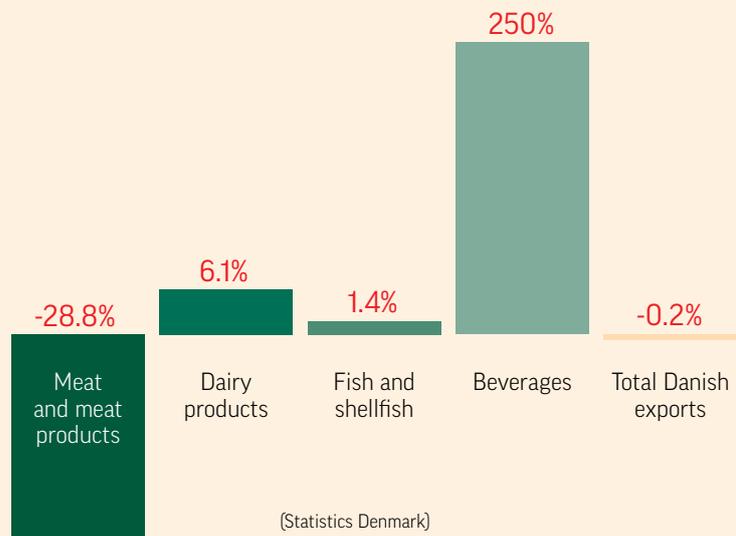


## Trading with the UK

For centuries, the UK has been among Denmark's most important trading partners. Over the past decade, however, other markets have challenged this position – notably Germany and the US. Within the food sector, exports of classic goods, such as meat products (bacon), have declined while beverage products and solutions are rising.

From 2017 to 2018, exports of agricultural machinery to the UK increased by 10%. In 2018, total machine exports to the agricultural and food sectors exceeded DKK 500 million. (Danish Agriculture & Food Council 2019)

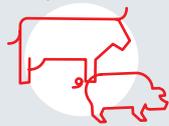
## Export development 2010-2019



## Total Danish exports of goods

DKK **45**  
billion

### Meat and meat products



DKK 3.6 billion

## Exports of food and agricultural goods 2019

### Dairy products



DKK 1.6 billion

### Fish and shellfish



DKK 1.2 billion

### Beverages



DKK 615 million

## Danish strongholds – animal welfare and sustainability

Compared to the UK, Danish food products and solutions are rated favourably for animal welfare and sustainability. UK decision-makers generally rate UK food products and solutions higher than imported products and solutions. For 67% of UK decision-makers, the country of origin is of decisive importance, very important or important. Hence, they choose a supplier or business partner from a country they trust.

66% of UK decision-makers consider Danish food and agricultural products to have a high food safety standard, while 62% agree that quality is high and 57% that Denmark is known for strong brands. 57% think Danish food and agricultural products and solutions are among the most sustainable in the world.

Awareness of Denmark as a food nation is relatively high in the UK. Efforts to drive awareness should focus on the following five attributes:

## Top five attributes for British decision-makers

When producing, purchasing, selling or handling food and agricultural products and solutions, the following five attributes are important to British decision makers.

**46%**  
Animal welfare

**45%**  
Sustainability

**42%**  
Quality

**41%**  
Low environmental impact

**40%**  
Organic

## Sustainability tendencies according to British decision-makers

“Denmark is popular in the UK and a good potential partner because they have high standards of production and quality food and they are close to us, so the air miles are limited.

UK decision-maker in the restaurant sector

**85%** Sustainability will become more important to our company in the coming years.

**75%** Our customers are demanding more sustainable products.

**69%** It is necessary to have sustainable products to secure long-term growth.

**68%** We prefer to buy and collaborate with companies that have a focus on sustainability.

**57%** Danish food and agricultural products and solutions are among the most sustainable in the world.

**53%** Sustainability is more relevant than price or other trading parameters.

**48%** Private companies are responsible for driving a sustainable development.

### Drivers of sustainable development from a British perspective

**2**  
Minimising waste in the value chain

**1**  
Using recyclable materials in production

**3**  
Sustainable transport solutions

### Business opportunities in the UK

Three business opportunities have been identified for increasing brand awareness and strengthening Denmark's market position in the UK:

- Continue to drive brand awareness and overcome home bias by showcasing Danish strongholds within animal welfare and sustainability.
- Emphasise the company's contribution to sustainability when promoting products and solutions.
- Communicate about how Danish products and solutions can support more sustainable production, especially by using recyclable materials.

“To a consumer, a Danish product would be associated with a quality product. Not necessarily a cheap product.  
UK decision-maker in the raw materials sector

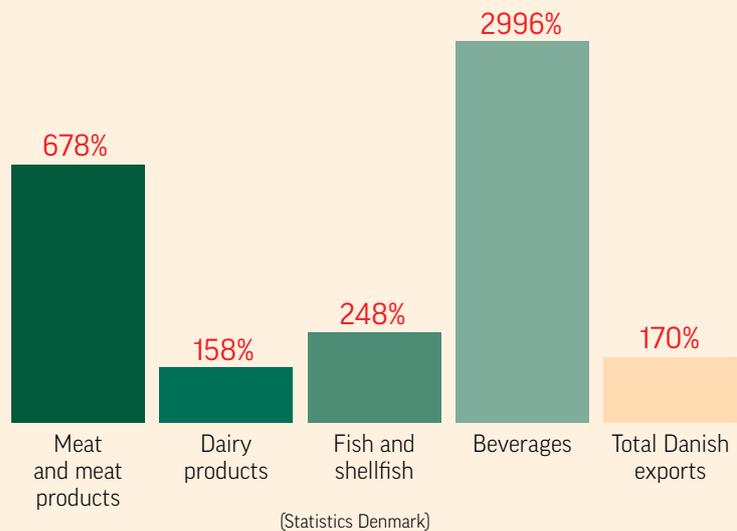


### Trading with China

Denmark is a small - but rising - trading partner for China. In 2019, Danish exports to China reached an all-time high, partly due to swine fever in China and the subsequent increase in Danish pork exports. Other food products and solutions are also attracting increased interest from the Chinese market.

Within agro-food machinery, Danish exports to China are slightly declining. From 2017 to 2018, food and agricultural machine exports fell around 5% to approximately DKK 250 million. (Danish Agriculture & Food Council 2019)

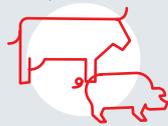
### Export development 2010-2019



### Total Danish exports of goods

DKK **36**  
billion

Meat and meat products



DKK 5.9 billion

### Exports of food and agricultural goods 2019

Dairy products



DKK 623 million

Fish and shellfish



DKK 2.4 billion

Beverages



DKK 72 million

### Danish strongholds – trust, quality and low environmental impact

Around six out of ten Chinese decision-makers position Denmark as a leading food and agricultural nation. Compared with Chinese products and solutions, Danish products and solutions are rated favourably in many areas, especially food safety and quality. For 80% of Chinese decision-makers, country of origin is of decisive importance, very important or important. Hence, they choose a supplier or business partner from a country they trust.

85% of Chinese decision-makers agree that Danish food and agricultural products have a high food safety standard, while 82% agree that quality is high and 55% say Denmark is known for strong brands. 60% think Danish food and agricultural products and solutions are among the most sustainable in the world.

To achieve higher brand awareness and a stronger market position, the following five attributes should be in focus:

### Top five attributes for Chinese decision-makers

When producing, purchasing, selling or handling food and agricultural products and solutions, the following five attributes are important to Chinese decision makers.

**61%**  
Food safety



**41%**  
Trustworthy

**36%**  
Quality



**28%**  
Low environmental impact

**27%**  
Science-based



## Sustainability tendencies according to Chinese decision-makers

“Chinese consumers are becoming more aware of products that are organic, but not sustainability in a more general sense. Organic relates to people and their own health. Sustainability is more related to the environment, so they are not so concerned with that.  
Chinese decision-maker from a food trading company

**86%**

Private companies are responsible for driving sustainable development.

**84%**

Sustainability will become more important to our company in the coming years.

**71%**

We prefer to buy and collaborate with companies that focus on sustainability.

**67%**

It is necessary to have sustainable products to secure long-term growth.

**60%**

Danish food and agricultural products and solutions are among the most sustainable in the world.

**44%**

Our customers are demanding more sustainable products.

**41%**

Sustainability is more relevant than price or other trading parameters.

### Drivers of sustainable development from a Chinese perspective

**2**

Environmentally friendly packaging

**1**

Reduced environmental footprint

**3**

Efficient use of raw materials, including water and energy

### Business opportunities in China

Three business opportunities have been identified for increasing brand awareness and strengthening Denmark's market position in China:

- Drive brand awareness and overcome home bias by showcasing Danish strongholds in relation to trustworthiness, food quality and safety.
- Highlight Danish companies as international front-runners for sustainable products and solutions.
- Emphasise the use of environmentally-friendly packaging and its positive effect on the sustainability agenda.

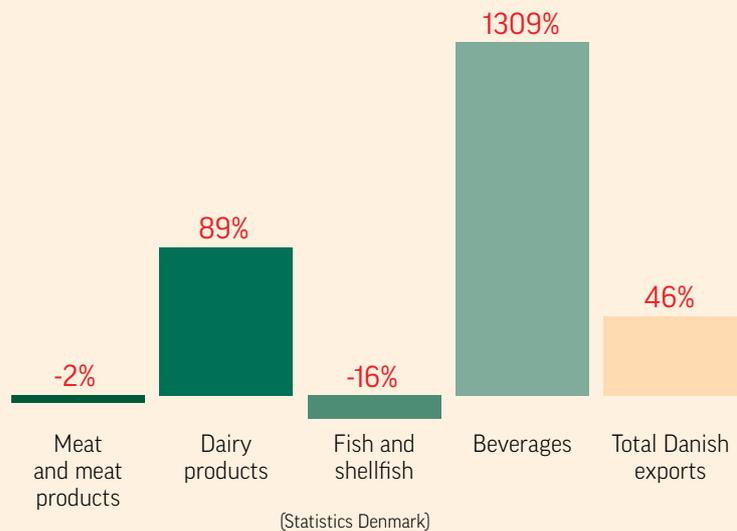
“Chinese people love to shop online. So, if they were able to buy it [organic products] online, they would probably buy it.  
Chinese decision-maker from a food trading company

### Trading with Japan

Japan has slowly become a more important market for Danish food and agricultural products and solutions. Danish food exports to Japan have increased over the past 10 years, particularly beverage and dairy products.

From 2017 to 2018, Danish machine exports to the Japanese food industry increased by 32% - from DKK 74 million in 2017 to DKK 98 million in 2018. (Danish Agriculture & Food Council 2019)

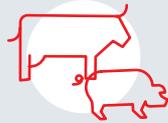
### Export development 2010-2019



### Total Danish exports of goods

**DKK 16 billion**

#### Meat and meat products



DKK 3.5 billion

### Exports of food and agricultural goods 2019

#### Dairy products



DKK 630 million

#### Fish and shellfish



DKK 215 million

#### Beverages



DKK 22 million

### Danish strongholds – animal welfare, quality and food safety

Compared to Japanese products and solutions, Danish food and agricultural products and solutions are rated positively for animal welfare, quality, food safety and cooperation. However, Japanese decision-makers generally rate domestic food products and solutions a little higher than imports. For 77% of decision-makers, country of origin is of decisive importance, very important or important. Hence, they choose a supplier or business partner from a country they trust.

81% of Japanese decision-makers agree that Danish food and agricultural products have a high food safety standard, while 82% rate product quality as high and 66% agree that Denmark is known for strong brands. 67% regard Danish food and agricultural products and solutions as among the most sustainable in the world.

To achieve higher brand awareness and a stronger market position, the following five attributes should be in focus:

### Top five attributes for Japanese decision-makers

When producing, purchasing, selling or handling food and agricultural products and solutions, the following five attributes are important to Japanese decision makers.

**41%**  
Sustainability



**40%**  
Cooperation

**39%**  
Quality



**37%**  
Low environmental impact

**33%**  
Transparency



## Sustainability tendencies according to Japanese decision-makers

“If they [Japanese consumers] notice food from Europe, they are willing to spend more money because they have a better image. And people are also conscious of choosing food that has a minimum amount or no amount of pesticides or insecticides.

Japanese decision-maker from a food trading company

- 89%** | Sustainability will become more important to our company in the coming years.
- 78%** | Our customers are demanding more sustainable products.
- 78%** | It is necessary to have sustainable products to secure long-term growth.
- 75%** | We prefer to buy and collaborate with companies that have a focus on sustainability.
- 67%** | Danish food and agricultural products and solutions are among the most sustainable in the world.
- 64%** | Private companies are responsible for driving sustainable development.
- 51%** | Sustainability is more relevant than price or other trading parameters.

### Drivers of sustainable development from a Japanese perspective

**2**  
Using recyclable materials in production

**1**  
Minimising waste in the value chain

**3**  
Environmentally-friendly packaging

### Business opportunities in Japan

Three business opportunities have been identified for increasing brand awareness and strengthening Denmark's market position in Japan:

- Drive brand awareness and overcome home bias by showcasing Danish strongholds within animal welfare and cooperation.
- Show that Danish companies are international front-runners within sustainable products and solutions.
- Emphasise how Danish companies can contribute to minimising waste in the supply chain and production.

“We [Japanese consumers] would like to choose a company that is environmentally conscious, because we want to support their effort.

Japanese decision-maker from a food trading company



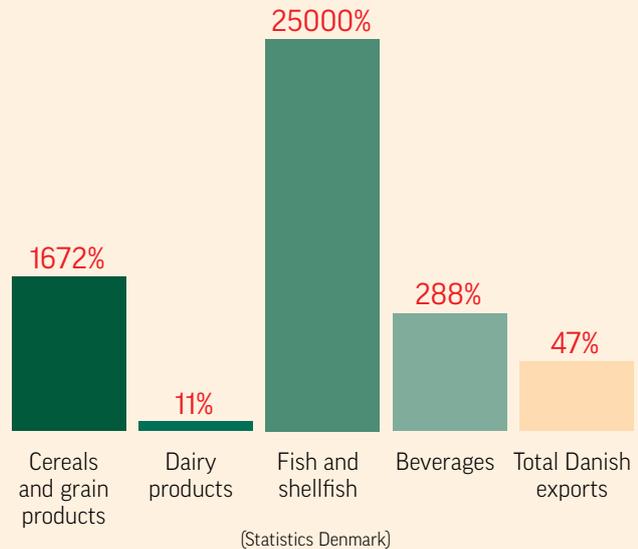
### Trading with India

India is a new - and still relatively small - market for Danish exports. As one of the world's most populous countries, which has experienced high economic growth for some years, India is of growing interest.

Within the food sector, exports of certain food products to India have exploded over the past ten years, particularly fish and shellfish. Cereals, grain products and beverages are also on the rise.

With regard to exports of food and agricultural machinery, the Indian market is still quite small for Danish companies. Exports are growing, however. Machine exports to the food industry increased by 92% from 2017 to 2018, going up from DKK 36 million to DKK 69 million. Exports of agricultural machinery increased by 10% to a total of DKK 38 million in 2018. (Danish Agriculture & Food Council 2019)

### Export development 2010-2019



### Total Danish exports of goods

**DKK 4 billion**

### Exports of food and agricultural goods 2019

Cereals and grain products



DKK 72 million

Dairy products



DKK 27 million

Fish and shellfish



DKK 2 million

Beverages



DKK 0.8 million

### Danish strongholds - animal welfare and sustainability

Compared to Indian products and solutions, Danish products and solutions are rated positively for sustainability and animal welfare. Indian decision-makers generally rate Indian food products and solutions higher than imported products and solutions. For 63% of them, country of origin is of decisive importance, very important or important. Hence, they choose a supplier or business partner from a country they trust.

74% of Indian decision-makers agree that Danish food and agricultural products have a high food safety standard, while 80% regard quality as high and 69% agree that Denmark is known for strong brands. 57% think Danish food and agricultural products and solutions are among the most sustainable in the world.

To achieve higher brand awareness and a stronger market position, the following five attributes should be in focus:

### Top five attributes for Indian decision-makers

When producing, purchasing, selling or handling food and agricultural products and solutions, the following five attributes are important to Indian decision-makers:

**42%**  
Sustainability



**38%**  
Animal welfare

**37%**  
Low environmental impact



**37%**  
Reliable

**32%**  
Trustworthy



## Sustainability tendencies according to Indian decision-makers

“ [Danish food and agricultural companies] are doing good research about what is happening. You try to improve and maintain standards so you always can be on top.  
Indian decision-maker from an organic production company

- 89%** | Sustainability will become more important to our company in the coming years.
- 70%** | It is necessary to have sustainable products to secure long-term growth.
- 70%** | We prefer to buy and collaborate with companies that focus on sustainability.
- 63%** | Our customers are demanding more sustainable products.
- 59%** | Danish food and agricultural products and solutions are among the most sustainable in the world.
- 53%** | Private companies are responsible for driving sustainable development.
- 43%** | Sustainability is more relevant than price or other trading parameters.



### Business opportunities in India

Three business opportunities have been identified for increasing brand awareness and strengthening Denmark's market position in India:

- Drive brand awareness and overcome home bias by showcasing Danish strongholds within animal welfare and low environmental footprint.
- Show that Danish companies are global front-runners when it comes to sustainable solutions.
- Demonstrate how Danish companies use recyclable materials and sustainable packaging to drive the sustainability agenda.

“ There is large potential for sustainable growth in food and agricultural production. We can create jobs.  
Indian decision-maker from an organic production company

A warm, inviting breakfast scene on a wooden table. In the foreground, a white ceramic bowl with a blue floral pattern is filled with oatmeal, topped with sliced bananas, fresh raspberries, blueberries, and almonds. A silver spoon rests in the bowl. To the left, a lit candle in a white square holder provides a soft glow. In the background, a glass pitcher of coffee and several white ceramic cups with blue floral patterns are visible. The overall atmosphere is cozy and comforting.

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 to strengthen Denmark's international brand.**

## **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.

## **SUSTAINABILITY**

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

## **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 agriculture companies excel.

## **COLLABORATION**

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

## **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 agricultural sector, Denmark can deliver natural, healthy and highly nutritious food products and solutions.

## **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.

## **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.

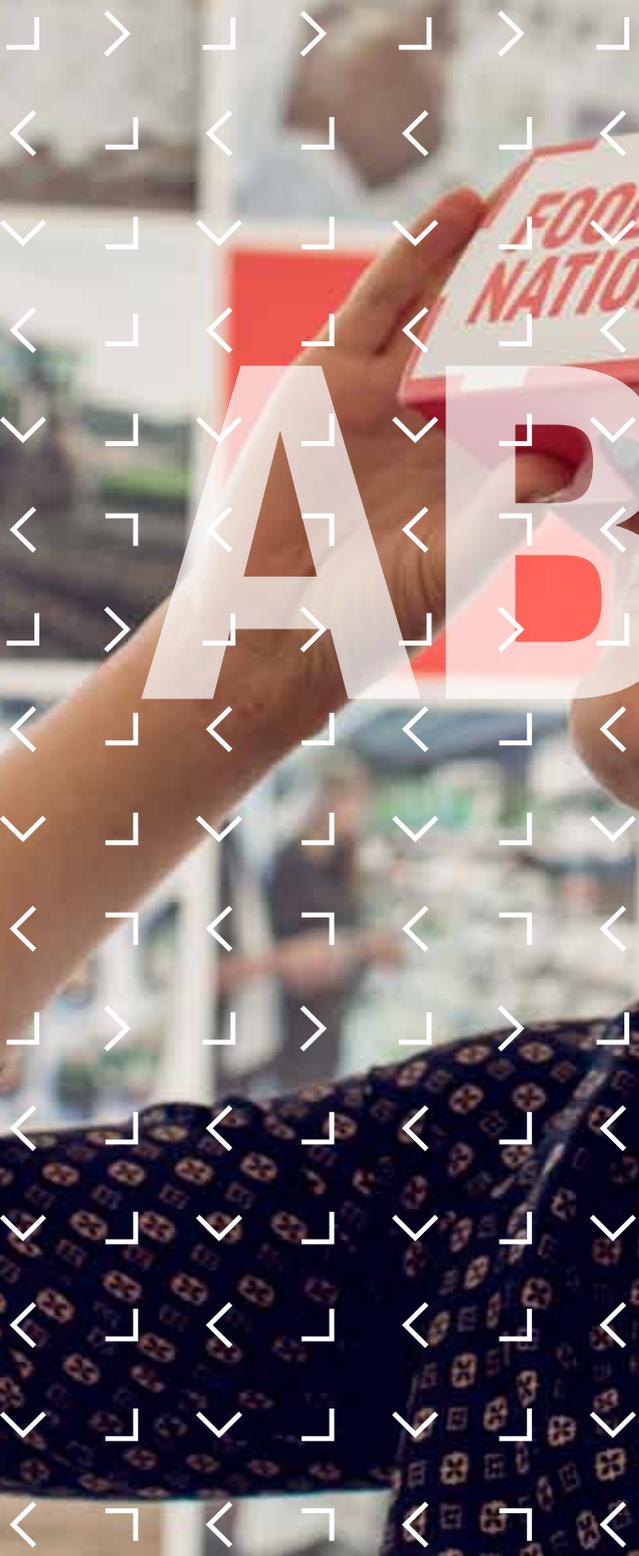
## **INNOVATIVE TECHNOLOGY**

Danish food and agricultural technology is behind many innovative solutions that minimise food loss and waste, improve hygiene and optimise sustainability, providing better food for more people.

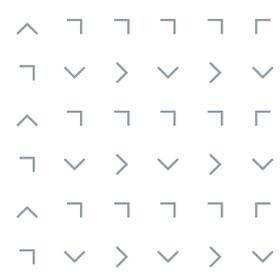
*Interested in reading more about the strongholds in the Danish food cluster?  
Download our white papers at [www.foodnationdenmark.com/toolbox](http://www.foodnationdenmark.com/toolbox)*



# ABOUT



Supporting  
the  
development  
of  
the  
community



# 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 Danish food and agricultural products and solutions.

Food Nation welcomes international delegations to its visitor centres in Copenhagen and Aarhus. By joining our interactive tour, you and your business partners will be introduced to Denmark as a world-leading food nation, including the Danish food and agricultural strongholds.

Find out more about Food Nation's services and arrange a visit to the visitor centres at [www.foodnationdenmark.com](http://www.foodnationdenmark.com).

## **FREE MARKETING MATERIAL**

Food Nation provides Danish companies with insights and marketing material to support their export journey. Visit [www.foodnationdenmark.com/toolbox](http://www.foodnationdenmark.com/toolbox) to download:

- Insight reports and articles
- Publications, including white papers
- Fact sheets
- Graphic material

## **ABOUT THE REPORT**

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

If you are interested in obtaining the data behind this report, feel free to contact Food Nation at [foodnation@foodnationdenmark.dk](mailto:foodnation@foodnationdenmark.dk).







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