

# INSIGHT REPORT

ON DENMARK AS A FOOD NATION 2024  
CLIMATE ACTION AND SUSTAINABILITY  
AS KEY EXPORT DRIVERS



Solutions of tomorrow  
By Denmark

## **Insight Report on Denmark as a Food Nation 2024**

Climate action and sustainability as key export drivers  
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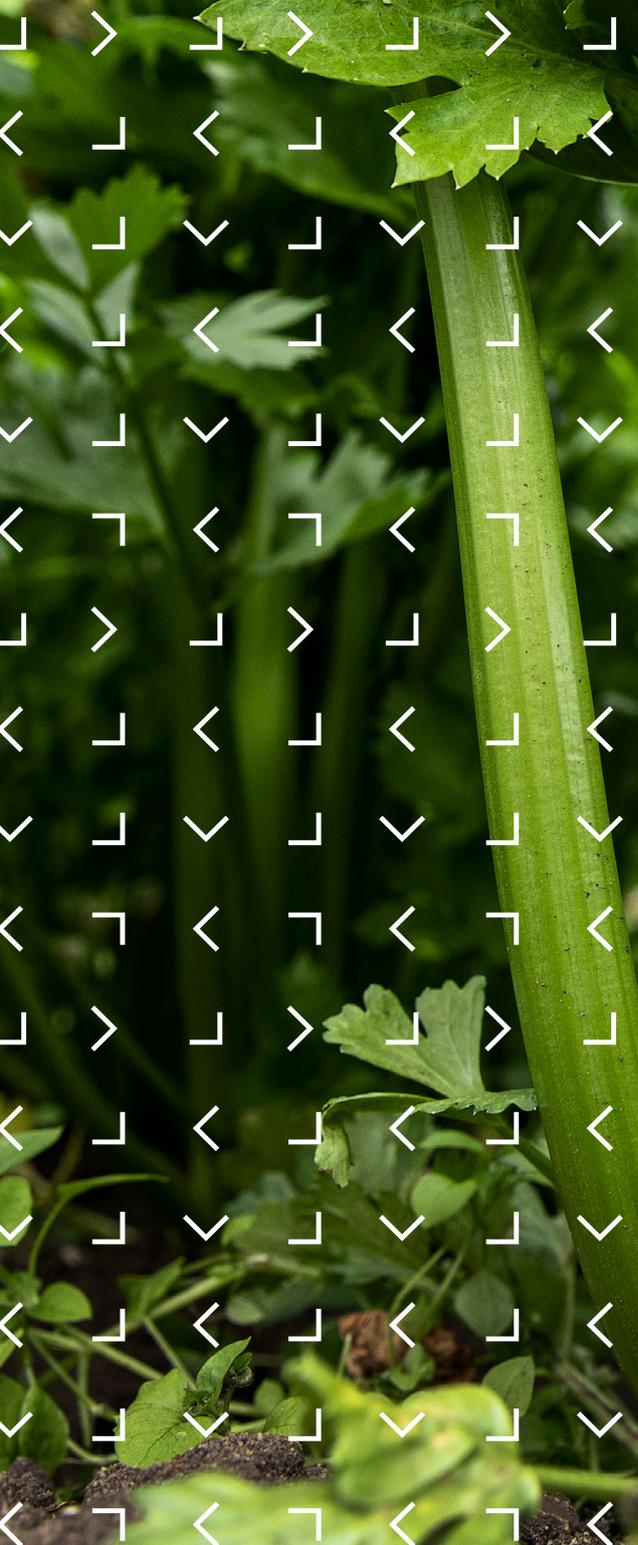


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# FOREWORD



# FOREWORD

## Emerging opportunities in demand for greenhouse gas reductions

In a time when climate action is essential, understanding what export markets prioritize for reducing CO2 is crucial. The Insight Report 2024 shows that priorities differ across markets.

The key role of the agriculture and food sector in reducing greenhouse gases is widely recognized. For Danish agriculture and food companies aiming to export, emphasizing the sector's contribution to climate solutions can benefit brand positioning. This report provides new valuable insights that can be integrated into export sales tools to strengthen your brand.

### **New agreements accelerate transition**

Recent events underscore the close link between agriculture, food, and climate. At COP28, 160 countries endorsed a declaration on sustainable agriculture, resilient food systems, and climate action, acknowledging the critical link between food systems and climate change mitigation.

The Emissions Gap Report 2023<sup>1</sup> highlights that global greenhouse gas emissions reached a record in 2022, with 57.4 gigatons of CO2 equivalents emitted globally in 2022. Including the entire value chain, the agriculture and food sector accounts for 31% of global greenhouse gas emissions<sup>2</sup>.

This data underlines the urgent need for sustainable and innovative solutions that reduce greenhouse gases while maintaining food supply. In June, Denmark announced a historic agreement to cut the national carbon footprint by taxing agricultural emissions, becoming the first country in the world to do so. This ambitious agreement, formed by a broad coalition of stakeholders, aims to transform Danish agriculture to achieve climate and biodiversity goals while maintaining Denmark's leadership in food production.

It sets global standards for the actions needed to reach climate goals and presents a unique business opportunity for Danish agriculture and food companies to develop solutions and products that will be globally desired.

### **Denmark has the innovative solutions**

Since Denmark's establishment of the world's first Ministry of Environment in 1971, the Danish strongholds of collaboration, innovative technology, and sustainability have solved many demanding challenges to the benefit of the environment and business.

Today, advanced agricultural systems enable farmers to grow high-yield, climate-resilient crops with minimal fertilizers and pesticides. They also raise livestock with reduced emissions through improved feed efficiency and better manure management. Food and ingredient companies innovate with plant-based proteins and fermentation technologies to create sustainable, nutritious food options that effectively utilize raw materials. Technology suppliers support these efforts by providing advanced machinery and precision farming tools that help maintain high standards of food safety and quality from production to distribution.

### **Strengthen your brand to enable global change**

This report illustrates Denmark's positive impact and impression in these areas, focusing on the synergy between global climate and sustainable food systems. It includes case stories from companies with successful branding experiences in this year's three focus markets: Japan, South Korea, and the United Kingdom. Based on the survey findings, the report offers recommendations for strengthening branding and marketing strategies in these export markets, where there is considerable growth potential.

This 2024 Insight Report is the sixth published by Food Nation for established and emerging export companies in the Danish agriculture and food sector. We hope it will provide valuable inspiration to your export activities.

Lise Walbom, CEO, Food Nation

<sup>1</sup> Emissions Gap Report (2023): Broken Record - Temperatures hit new highs, yet world fails to cut emissions (again). Available from: <https://www.unep.org/resources/emissions-gap-report-2023>

<sup>2</sup> IPCC, (2022): Summary for Policymakers



# EXECUTIVE SUMMARY

The 2024 Insight Report from Food Nation provides essential market insights for Danish companies in the agriculture and food sector aiming to refine their export strategies. Conducted in collaboration with Epinion, this quantitative survey examines awareness of the Danish agriculture and food sector and its unique selling points, forming the basis for this report.

This year, the survey targeted business-to-business decision-makers in Japan, South Korea and the UK. The findings provide crucial insights and identify current business opportunities for Danish exporting and export-ready companies in these markets. The report explores perceptions of Danish strengths, aligning them with specific market needs and values.

## **Low top-of-mind ranking highlights the potential to increase awareness**

Top-of-mind awareness of Denmark in terms of agriculture and food production among decision-makers in Japan, South Korea, and the UK is relatively low, with Denmark ranked as the 21st most mentioned country. Despite Denmark holding the highest position among Scandinavian countries, this comparatively low awareness underscores the potential to enhance recognition and perception of Danish strengths in the agriculture and food sector.

## **Recognition as a leading food nation**

While Denmark may not always be top-of-mind for decision-makers, a substantial 70% agree or strongly agree that Denmark is a leading agriculture and food nation. This strong brand awareness is evident across all three surveyed markets, underscoring the potential for market growth and the strategic importance of Denmark's agriculture and food sector.

## **Focus on products with a low environmental impact enhances export opportunities**

The agriculture and food sector's relationship with climate change is widely recognized. The surveyed decision-makers identify initiatives such as reducing food waste, enhancing production recycling, and embracing renewable energy solutions as the most crucial in reducing greenhouse gas emissions. These areas represent substantial opportunities for Danish companies in Japan, South Korea, and the UK, offering a competitive edge in the export market through strategic product optimization and branding.





# ABOUT



# ABOUT THE SURVEY

The Insight Report on Denmark as a Food Nation 2024 is based on a quantitative survey conducted by Epinion for Food Nation from March to May 2024. Targeting business-to-business decision-makers in the Japan, South Korea and the UK the survey focuses on Denmark's image as a leading food nation in these crucial markets. A total of 635 decision-makers within the agricultural and food sector participated, ensuring a robust dataset.

## The survey has two overall aims:

- Facilitate export and product development: By providing actionable insights and market trends, the report supports exporters in identifying new opportunities and refining their offerings to meet international demand.
- Strengthen Denmark's global position: Serving as a strategic tool, the report reinforces Denmark's reputation and competitive edge among international trade partners, drawing insights from a diverse cross-section of decision-makers spanning various industries.  
The survey covers a broad representation of decision-makers across various industries within the entire agriculture and food sector, with approximately 200 decision-makers per market. This diverse group ensures a comprehensive perspective, and sample of respondents that will vary from year to year.

While the report provides valuable insights into the current strengths and areas of improvement of the Danish agriculture and food sector, it is important to underline that these insights are based on the specific decision-makers surveyed in each period. This variability underscores the evolving landscape of the sector and the continuous need for updated insights.  
For Danish companies in the agriculture and food sector, the 2024 Insight Report offers nuanced insights to effectively refine export strategies. It explores perceptions of Denmark, provides understanding of key unique selling points (USPs), and assesses the sector's perspective on climate action in Japan, South Korea and the UK.

This report serves as a valuable resource for aligning business strategies with international perceptions, enhancing market positioning, and leveraging sustainable practices for competitive advantage.

## Follow the QR codes or links to visit the 2024 market deep dive for each market

JAPAN  
**213**  
interviews

SOUTH KOREA  
**206**  
interviews

UK  
**216**  
interviews



[Link to Japanese market](#)



[Link to South Korean market](#)



[Link to UK market](#)

# BRAND

# BRAND AWARENESS

## Increasing Danish export potential

The results of this year's Food Nation survey provide new insights into how Denmark is viewed by decision-makers in three export markets – Japan, South Korea and the UK. These results highlight opportunities to increase future exports by enhancing awareness of the Danish brand in these markets.

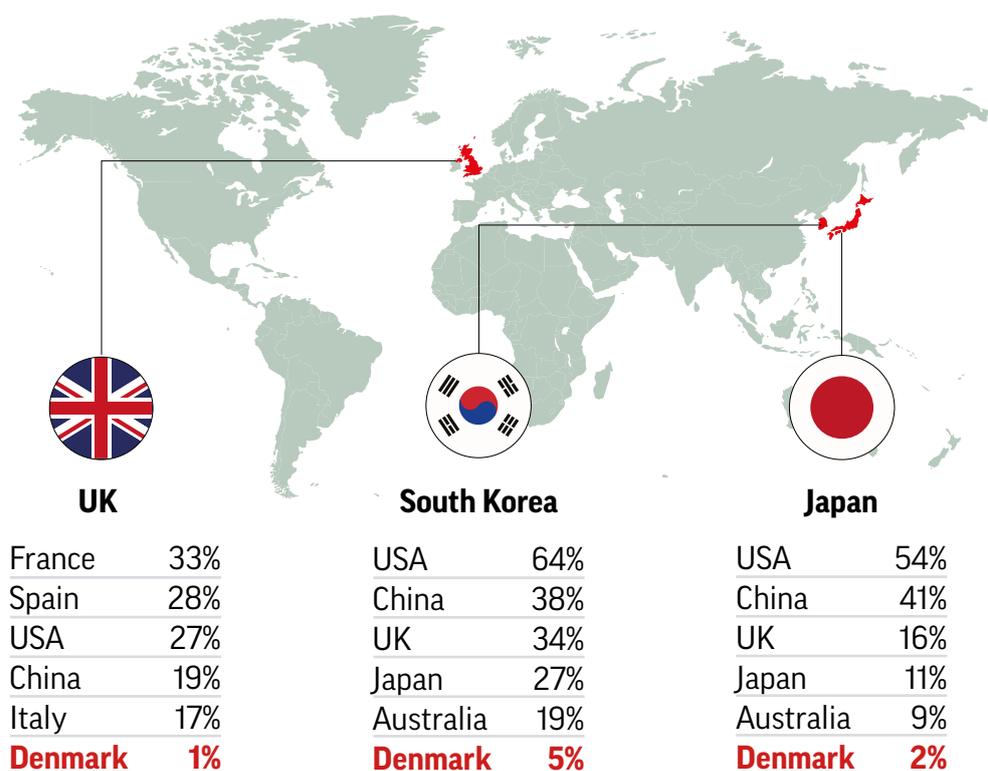
### How top-of-mind is Denmark?

When asked about which countries come to mind within agriculture and food production relevant to their industry, 2% of the surveyed decision-makers mention Denmark as one of the top 5 countries. This places Denmark as the 21st most mentioned country, making it the most mentioned Scandinavian country compared to its counterparts, Norway and Sweden, which are ranked 27th and 28th respectively.

It is noteworthy that 5% of South Korean decision-makers mention Denmark, placing it as the 13th most mentioned country among this group of respondents. This puts Denmark above East Asian countries such as the Philippines, Taiwan and Indonesia.

Only a very few British decision-makers mentioned Denmark this year, which is surprising given the geographical proximity and substantial trade. The low awareness of Denmark is likely influenced by the sample of respondents, who may work in parts of the sector where Danish companies has a smaller presence. This illustrates how the sample of respondents may affect the results, serving as a reminder that these figures provide a partial view of the market.

Figure 1. Unaided awareness of agriculture and food producing nations split by decision maker's home country



### How well is Denmark known?

Although Denmark isn't very top-of-mind for the decision-makers, the picture is quite different when they are asked directly about Denmark as an agriculture and food nation. More than 7 in 10 of the decision-makers agree or strongly agree that Denmark is a leading agriculture and food nation. This number is especially high in South Korea, where 87 percent of decision-makers agree or strongly agree. This is a promising result, that highlights the strong position of the Danish brand awareness. Further, this presents significant opportunities for further market growth driven by higher brand awareness. 45 percent of the surveyed decision-makers agree or strongly agree that they don't know much about Danish agriculture and food solutions. As this is a pattern seen across the countries, the potential for increasing decision-makers' knowledge about Danish products and solutions is quite evenly distributed among Japan, South Korea and the UK.

### How important is country of origin?

According to the decision-makers, the country of origin is crucial when choosing a supplier or source of food products and solutions. About 3 in 4 of the decision-makers from the surveyed countries believe country of origin is important, very important or decisive.

The decision-makers are relatively similar in their attitude towards the role played by country of origin when choosing a supplier of food products and solutions.

The overall high importance regarding country of origin emphasizes the importance of a strong Danish brand. This can be particularly relevant in the food system, where consumers and businesses alike prioritize the origin of their products due to concerns about health criteria, safety standards, sustainability and production ethics.

Figure 2. Proportion of decision-makers who agree or strongly agree with statements about Denmark as an agriculture and food nation

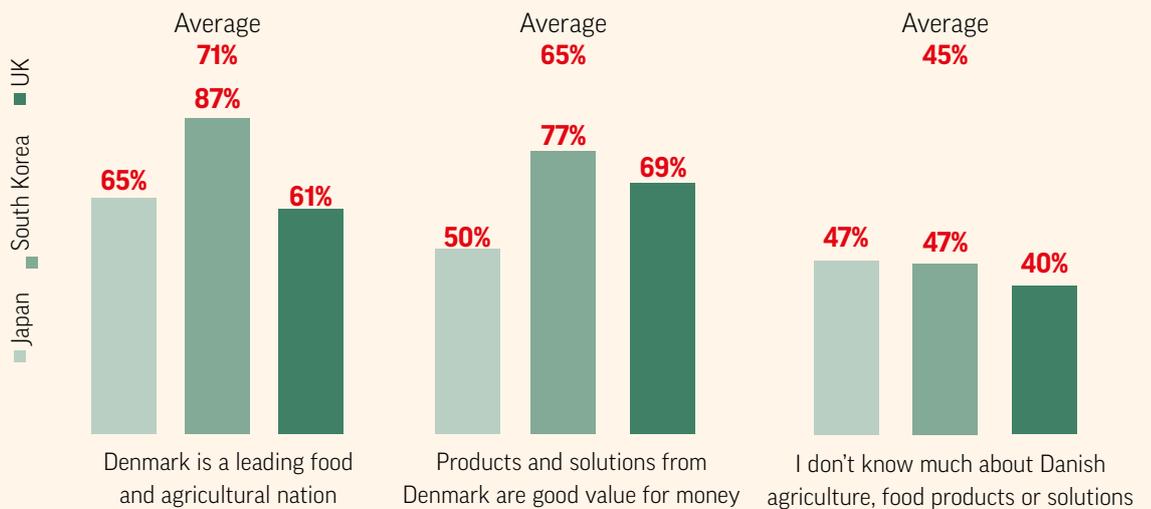
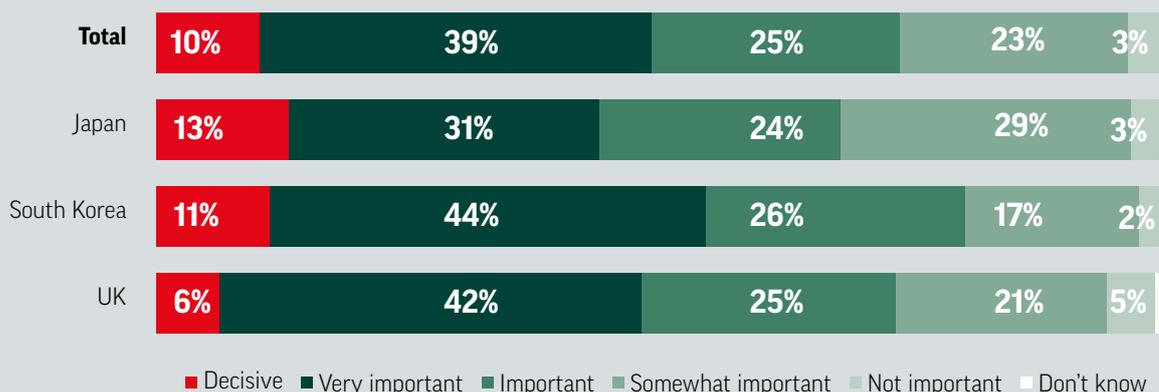


Figure 3. How important is country-of-origin for your company when choosing a supplier/source of food products and solutions?



## Summary of recommendations for building brand awareness in export markets

### ➤ Enhance awareness

Enhance brand awareness by leveraging Denmark's strong reputation in the agriculture and food sector to increase export potential.

### ➤ Leverage the strong perception of Denmark

Despite low top-of-mind awareness, leverage the strong perception of Denmark as a leading agriculture and food nation and focus on increasing knowledge about the strongholds behind Danish products and solutions to drive market growth and brand awareness.

### ➤ Highlight unique selling points

Emphasize Denmark's strong brand by highlighting unique selling points and strongholds to enhance trust and preference among international buyers, driving higher exports.

### ➤ Understand and build relationship with local culture

Invest time in building deep relationships with local customers to understand the value they can find in your products. This involves understanding the local culture, working together with your customers and sharing your knowledge with them.

## How FOSS raises awareness through local presence

Henrik Wiboltt, Senior Vice President of Global Sales at FOSS, highlights the importance of local presence and collaboration in raising market awareness. He emphasizes the synergy between direct customer engagement and leveraging Danish trade promotion efforts.

*“By being locally present and communicating our innovations through targeted campaigns and direct dialogue, we effectively raise market awareness. Leveraging opportunities provided by Danish trade organizations and government initiatives significantly amplifies our efforts.”*

*Henrik Wiboltt, Senior Vice President of Global Sales at FOSS.*

### MARKET SPECIFIC DEEP DIVES

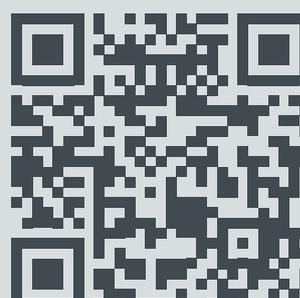
Follow the QR code or link below to read three brief and separate market deep dives for the Japanese, South Korean and UK markets - among others.



[Link to Market Deep Dives](#)

### TOOLS FROM FOOD NATION

Follow the QR code or link below, to find tools and materials for growing brand awareness of the entire Danish food cluster.



[Link to Food Nation's Toolbox](#)

## CASE: FOSS

# Sustainable innovation transforms South Korean agriculture

### Establishing a Strong Presence

For over 30 years, FOSS has successfully penetrated the South Korean market with its analytical solutions for food and agriculture. A success highly dependent on the transitioning from distributor partnerships to establishing a direct presence. This strategic shift enabled closer customer relationships and a deeper understanding of local needs. Henrik Wiboltt, Senior Vice President of Global Sales at FOSS, emphasizes the importance of direct communication in fostering these relationships and delivering tailored solutions.

“*Distributors do a good job, but it's not the same. We need to be close to the customer and talk about their daily needs and future goals. This helps us improve our products and services and stay aligned with market trends.*”

Henrik Wiboltt, Senior Vice President, Global Sales at FOSS

### Commitment to Quality and Innovation

FOSS's success in South Korea is driven by dedication to quality and continuous innovation. The company's products for e.g. milk and feed analysis are highly regarded for their reliability and precision. These tools provide quick and accurate data, helping customers make informed decisions and improve productivity. This focus on quality has been a key differentiator in a market that values high standards.

### Aligning with Local Priorities

Navigating the challenges of South Korea's push for self-sufficiency, FOSS has adapted strategies to align with local priorities such as enhancing productivity and reducing waste. The company's efforts in sustainability resonate well with South Korean stakeholders, who prioritize environmental goals. By demonstrating how their solutions can reduce waste and greenhouse gas emissions, FOSS has positioned itself as a valuable partner in South Korea's agriculture and food sectors.

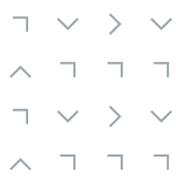
Case based on an interview with Henrik Wiboltt, Senior Vice President of Global Sales at FOSS

Core business: Analytical solutions for food and agriculture.

### FOSS' TOP EXPORT ADVICE

- » *Understand the local market: Analyze local needs and align products and strategies.*
- » *Build strong relationships: Establish a presence and foster close customer relationships.*
- » *Leverage sustainability: Showcase how your solutions reduce waste and emissions.*





## CASE: NOVONESIS

# Danish biosolutions revolutionize the Japanese food sector

### Leveraging a strong presence in Japan

Novonesis, a pioneer in biosolutions, has made significant strides in the Japanese market, offering innovative solutions to the food and beverage industry. With over 50 years of presence in Japan through its legacy companies, Novonesis has expanded the portfolio from enzyme products and starter cultures to encompass a broader range of food applications. With an aging and decreasing population, Japan has experienced an increased focus on healthy food products with functional claims. This demanding market has offered new opportunities for a science-driven company like Novonesis.

### Driving innovation and sustainability

The success of Novonesis in Japan can be attributed to its unwavering focus on innovation and sustainability. The company focuses on solutions that prolong the usability of food products, ensuring sustained quality and minimizing waste in response to the high standards of the Japanese market. "We bring biosolutions that enable extending shelf life, reducing food waste, and consequently lowering greenhouse gas emissions" explains Miyashita, Head of F&B Biosolutions. This strategy aligns perfectly with the dual goals of Japanese companies: enhancing sustainability and maintaining profitability.

### Cultivating strong relationships and trust

Forging strong relationships and establishing trust with local stakeholders are crucial elements of Novonesis's approach in Japan. The company places great emphasis on understanding the specific needs of Japanese consumers and industry clients. "It's vital to establish a deep relationship with customers, as trust and local insight are key to our success," says Inami, Head of Sales in Japan. To build brand awareness and credibility, Novonesis actively participates in trade shows, conducts direct customer meetings, and engages in industry collaborations.

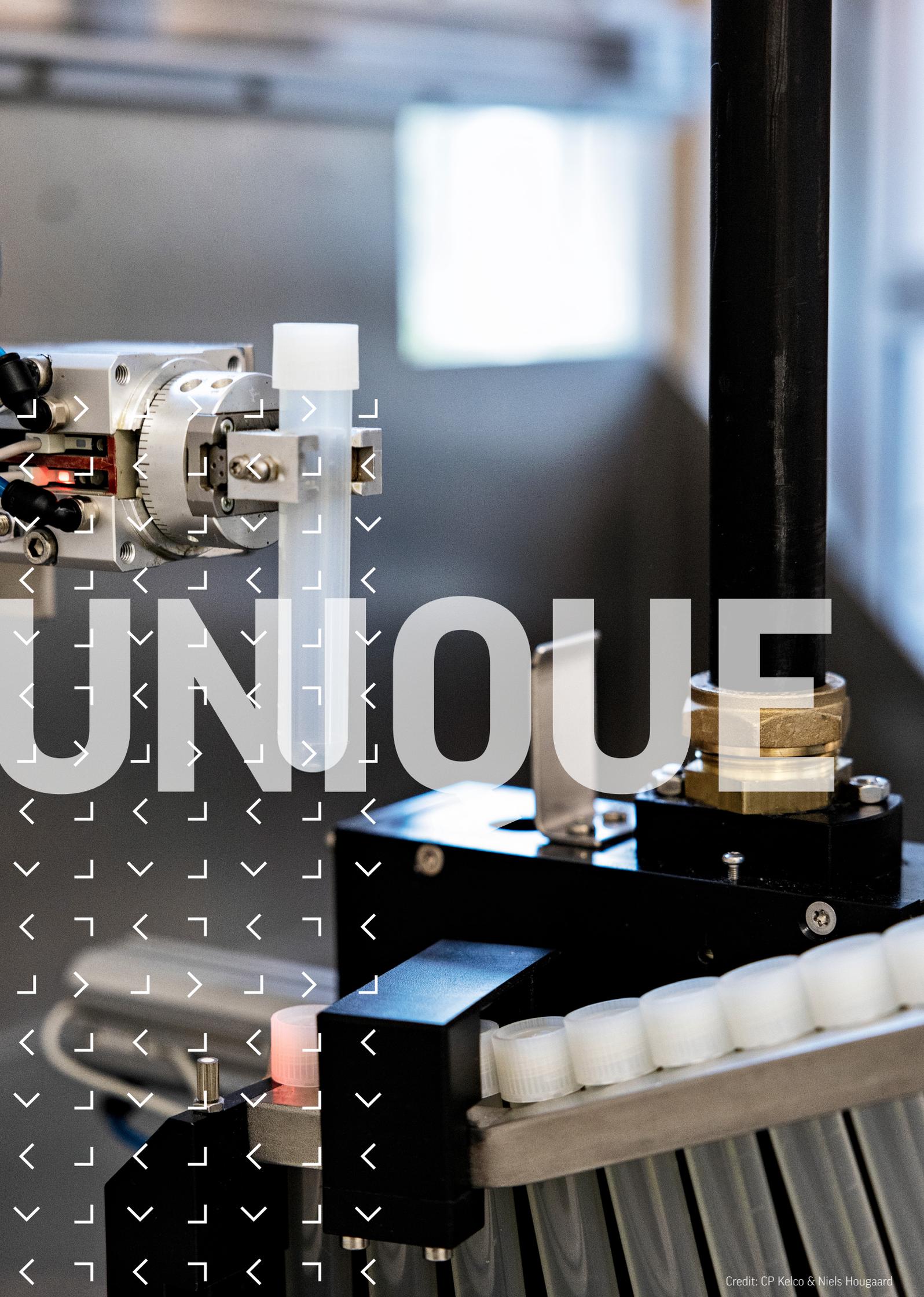
*Case based on an interview with Yo Miyashita, Head of F&B Biosolutions, and Yuki Inami, Head of Sales, Japan.*

*Core business: Biosolutions for Food and Beverage Industry.*

### NOVONESIS' TOP EXPORT ADVICE

- >> *Highlight the unique benefits and documented proof of your products.*
- >> *Invest time in developing trust with local customers through consistent interaction.*
- >> *Showcase how your solutions enforce sustainability e.g., by reducing waste and extending product shelf life.*





UNIQUE

# UNIQUE SELLING POINTS

## Capturing the potential of recognised strengths

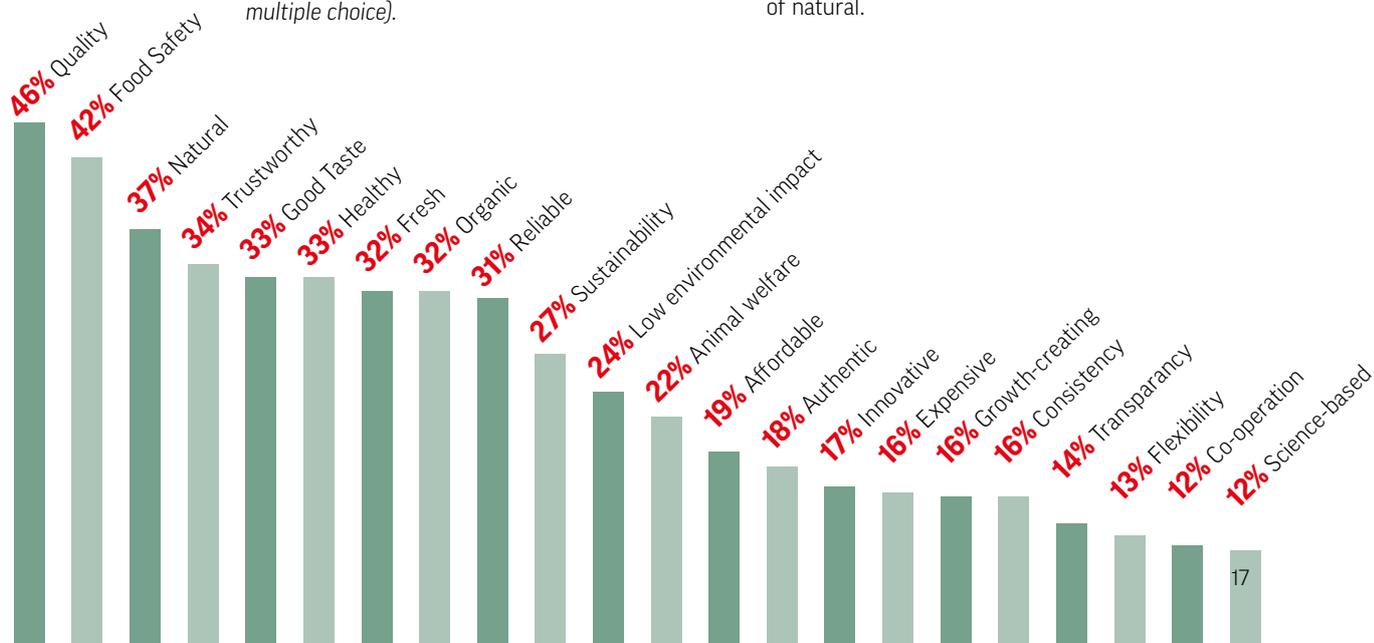
Positive perceptions of Denmark held by decision-makers from the three surveyed countries offer a strong foundation for Danish exporters of agriculture and food products and solutions when entering these important export markets. To effectively use these positive perceptions in branding strategies, exporters need to grasp what is behind the formation of these perceptions. This section includes insights from sector experts on key findings, illustrating how these perceptions can be leveraged to the advantage of international trade.

### What is Denmark known for?

When decision-makers are asked about Danish agriculture and food products and solutions, quality, food safety, and natural are the top attributes that come to mind (figure 4). But how can we understand these perceptions, and are there differences between the three markets? That is what we will delve into in this section.

Henrik Wiboltt, Senior Vice President, Global Sales at FOSS explains that part of the answer lies in the fact that Danish products generally stand for high brand value and quality – not only within food and agriculture – which has a spillover effect on the perception of other product categories as well.

Figure 4. Attributes that international decision-makers associate with Danish agriculture and food products and solutions (pre-defined words and multiple choice).

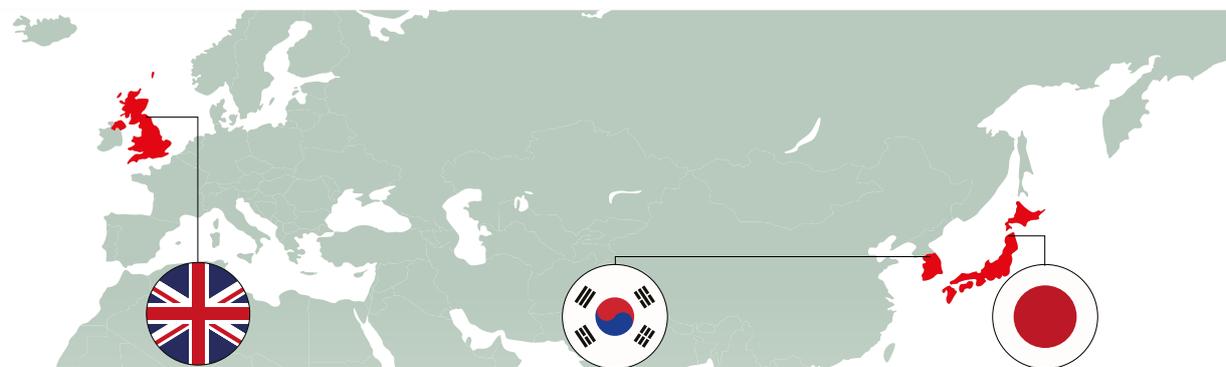
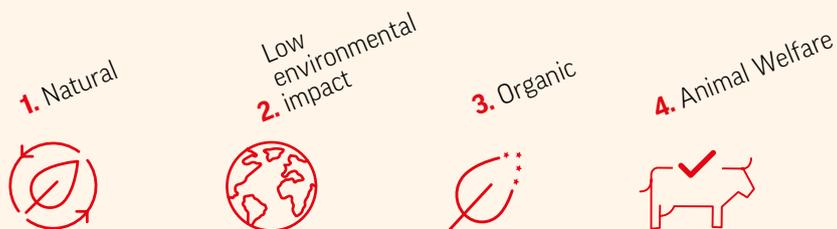


Among the three markets, Danish agriculture and food products and solutions are least associated with being science-based, flexible, and transparent. Depending on the market, focusing on these aspects could potentially add significant value and strengthen Denmark's market position. While having strong attributes in absolute terms is important, it is just as vital to distinguish products and solutions in comparison to each domestic market.

### Where does Denmark surpass home markets?

The associations with Danish agriculture and food products and solutions are encouraging. In general, natural, low environmental impact, organic and animal welfare are the key attributes where decision-makers perceive Danish products and solutions as better than domestic counterparts. However, there are important differences between the three markets in how they perceive Danish products, which underscores the importance of tailored branding strategies for each market. South Korean decision-makers rate Danish products and solutions higher than their own, highlighting deficiencies in domestic options on four parameters (see figure 5 on the next page). In Japan, Danish products stand out for their natural qualities and low environmental impact. Meanwhile, British decision-makers favor domestic products and solutions equally or more on most of the highlighted attributes besides the parameter of natural.

Figure 5. The top four attributes where decision-makers in Japan, South Korea and the UK rank Denmark higher than their domestic markets.



### The view from the UK

The positive differentiation of Danish products and solutions that can be seen in the Japanese and South Korean market, is not observed among decision-makers from the UK. Regarding organic, low environmental impact, and animal welfare, their domestic products and solutions are considered same level or better than Danish counterparts. Overall, British decision-makers rate Danish products and solutions at the same level or below the level of British products. However, it should be noted that British decision-makers rate both domestic and Danish products and solutions relatively high in general. This indicates that Denmark does not have a special positioning in the British market when compared to domestic products and solutions. Healthy is the attribute that positively differentiates Danish products compared to domestic versions, however, the difference remains limited.



*With a strong historical presence and being owned by UK farmers, my guess is that Arla products and brands are increasingly seen as big and international rather than coming from Denmark specifically.*

Marianne Gregersen, Commercial Sustainability Manager at Arla Foods

### The view from South Korea

South Korean decision-makers rate Danish productions and solutions significantly higher than domestic counterparts on the highlighted attributes: natural, low environmental impact, organic, and animal welfare. Decision-makers from South Korea rate domestic products and solutions lower on most parameters compared to the rating of domestic products by decision-makers from the two other countries. This leads to a considerable potential in distinguishing Danish products from domestic products especially based on the underlined parameters of natural, low environmental impact, organic, and animal welfare.



*Denmark used to be far ahead of its customers. South Koreans were not at all interested in what we discussed in Denmark regarding sustainability and animal welfare. Now, suddenly, everyone is interested. There has really been a shift, and it's incredibly exciting.*

Henrik Wibalitt, Senior Vice President, Global Sales at FOSS

### The view from Japan

Decision-makers from Japan particularly regard Danish food products and solutions as superior in terms of natural and low environmental impact compared to its domestic counterparts. Yo Miyashita, Head of F&B Biosolutions in Japan and Korea at Novonesis explains that Japanese decision-makers in general have a positive impression of Danish goods, particularly regarding their natural qualities and low environmental impact. This is partly due to the positive national image of Denmark as an advanced nation with a strong focus on sustainability.



*Japanese consumers see Denmark as an advanced country that truly cares about sustainability.*

Yo Miyashita, Head of F&B Biosolutions in Japan and Korea at Novonesis

Concerning the attributes of organic and animal welfare, the positive differentiation of Danish products is not as pronounced. Japanese decision-makers assess domestic products and solutions at a similar level to Danish products in these parameters. It is worth noting that both Danish and domestic products are rated relatively low on these two parameters compared to decision-makers from the UK and South Korea.

Figure 6. The bottom four attributes where decision-makers in Japan, South Korea and the UK rank Denmark lower than their domestic market.



### Where do home markets surpass Denmark?

In general, there is a potential to improve perceptions of Danish agriculture, food products and solutions relative to the three surveyed home markets. Decision-makers identify affordability, freshness, food safety, and taste as areas where Denmark is perceived to be lagging behind their domestic counterparts (figure 6) – though this varies by country. These areas therefore entail potential for improvement and can contribute to further strengthening Danish products.

In Japan, freshness is the area where Danish products score lowest compared to domestic products and solutions. In addition, reliable, trustworthy, and taste are attributes where decision-makers indicate that Danish products and solutions cannot match their domestic counterparts. This highlights a notable contrast in perception between Danish and Japanese markets. The insight also underlines the importance for Danish companies to communicate attributes such as the tastiness and freshness of their products, as these are crucial aspects in the three markets that are not inherently associated with Danish products.

“On the food quality side, I think Japanese people are very, very proud of our own food being of very high quality and tasty. And of course, food preferences depend on culture, so many here are not familiar with Danish foods, and that’s probably where the difference in perception comes from. Regarding freshness, imported food from Denmark takes time to get here, so it’s not as fresh as what we have in Japan. We import a lot of pork and dairy like cheese from Denmark. But these are not really fresh foods; they are meant to have a longer shelf life.”

Yo Miyashita, Head of F&B Biosolutions in Japan and Korea at Novonosis

For British decision-makers, the differences between Danish and domestic products and solutions are smaller in terms of good taste. Where Danish products and solutions particularly stand out negatively compared to British domestic products is in terms of food safety, which is also the attribute where British domestic products are rated highest. The perspective of South Korean decision-makers regarding Danish products and solutions, compared to their understanding of their domestic offerings, indicates that Danish products are expected to be less tasty, be less affordable, and score lower in terms of food safety.

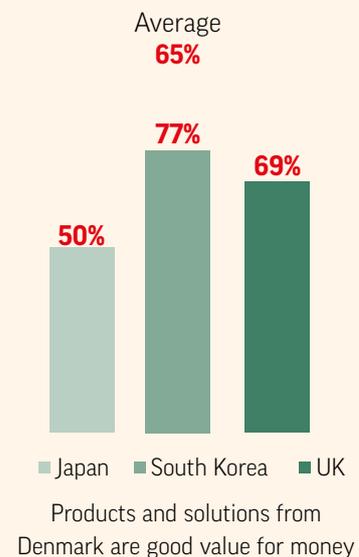
### Are exports from Denmark good value for money?

Overall, it is worth noting that decision-makers perceive domestic products and solutions as more affordable than Danish goods amongst the three markets. Despite this, a significant portion still perceives Danish products and solutions as offering good value for money. Across the three markets, 65% of decision-makers agree on this aspect. Particularly in South Korea, Danish products are valued positively, with 77% of South Korean decision-makers agreeing that Danish products provide good value for money. This underlines the fact that Danish products and solutions are expected to deliver high quality for their price. Danish goods do not necessarily compete on low prices, but rather on the high standards and quality that consumers are willing to pay for. In other words, there is a potential for Danish exporters in highlighting values such as organic, naturalness, and animal welfare to emphasize the high quality of their products, rather than competing on price.

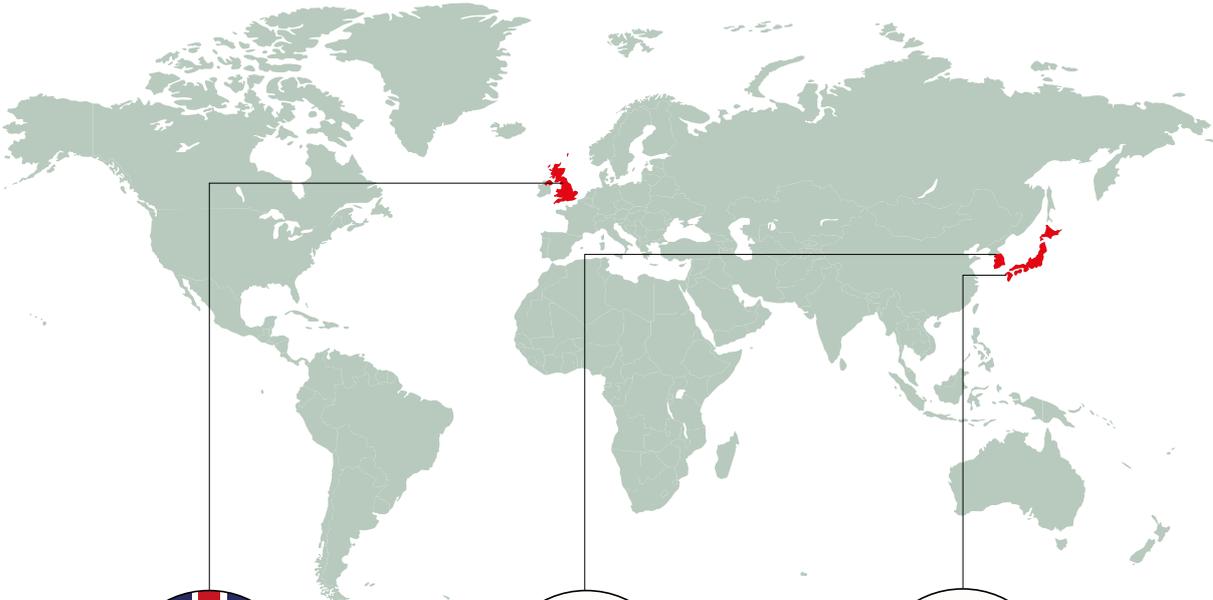
“Denmark is known for higher food prices, and we need to be good at selling our values. And it is only natural for people to question if Danish food is as fresh and safe as domestic food after long transport. I believe it’s a natural human reaction and consideration.”

Henrik Wiboltt, Senior Vice President, Global Sales at FOSS.

Figure 7. Level of agreement among decision-makers on the value of Danish agriculture and food products and solutions.



**Dive into the market of your interest**



Follow the QR code or the link below to visit the market deep dive for the UK.



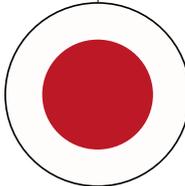
[Link to UK market](#)



Follow the QR code or the link below to read the South Korean market deep dive



[Link to South Korean market](#)



Follow the QR code or the link below to read the Japanese market deep dive



[Link to Japanese market](#)



## Summary of recommendations for building brand strengths in export markets

- **Emphasize natural and sustainable qualities**  
Highlight Denmark's strong reputation for natural and environmentally responsible food products. Use these attributes to differentiate products in the market.
- **Focus on quality and food safety**  
Leverage the perception of Danish products as high-quality and safe. Ensure these aspects are prominently featured in marketing materials to build trust and preference among international buyers.
- **Tailor marketing strategies to local preferences**  
Understand the unique preferences and expectations of each target market. Customize branding and communication strategies to align with local cultural and consumer expectations, particularly in markets like Japan and South Korea.
- **Promote Danish innovation**  
Emphasize Danish innovations in food technology that enhance quality and sustainability to overcome the perception of being less science-based. Showcase how Danish products incorporate advanced technologies to meet modern consumer needs.
- **Build strong relationships with local stakeholders**  
Invest in building deep, trust-based relationships with local customers and partners. This involves understanding local market dynamics, engaging in regular dialogue, and collaborating on sustainability initiatives.
- **Address freshness and concerns on affordability**  
Acknowledge and address any concerns about the freshness and affordability of Danish products. Highlight efforts to improve supply chain efficiency and offer value-for-money propositions, which is particularly relevant for long-distance markets.

### SIGN UP FOR EVENTS AND TALKS

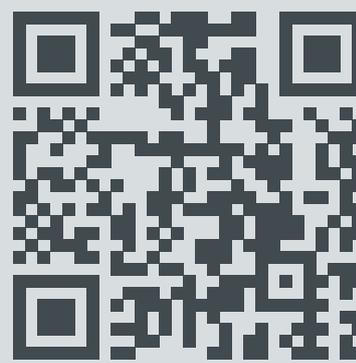
Follow the QR code or link below, to see and sign up for up and coming events on export in the Danish food sector.



[Link to events and talks](#)

### TOOLBOX LINK

Follow the QR code or link below to learn about the Danish strongholds and sectors, and access inspirational materials for promotion of products and solutions from the entire Danish food cluster.



[Link to Food Nation's Toolbox](#)

## CASE: ARLA FOODS

# Progressing in the UK through sustainability partnerships

### Global challenges call for science and data-based approach

Arla Foods, a dairy leader, has significantly progressed in the UK since the early 2000s. By focusing on sustainability and collaborating with farmers and retailers, Arla has built a strong brand and lasting relationships.

Arla addresses climate challenges with FarmAhead™ Technology, empowering farmers in their sustainability journey. "By utilizing this toolbox, Arla's farmer owners are not only rewarded for the steps they take but also gain insights into the most effective next steps," says Marianne Gregersen, Commercial Sustainability Manager. This initiative reduces farm carbon footprints and supports UK customers aligning with The Science Based Targets Initiative<sup>3</sup>.

### Driving sustainability through farmer and retailer partnerships

Building and maintaining strong relationships with farmers and retailers is a cornerstone of Arla's strategy. Gregersen highlights: "By participating in FarmAhead™ Customer Partnership, retail and foodservice customers can contribute to climate reduction initiatives on Arla farms." This collaboration provides valuable data for ESG reporting and supports scope 3 climate goals.

"Our customers share our climate ambition, and we can support them," says Gregersen. The FarmAhead™ program, first launched in the UK, has generated significant interest, aligning with the demand for eco-friendly practices and reflecting Arla's commitment to sustainable dairy production.

### Supporting social sustainability by giving back to society

Climate is not the only sustainability challenge that Arla Foods addresses. Arla also addresses social challenges by collaborating with Magic Breakfast to ensure children in the UK have access to nutritious breakfasts. "As the UK's largest dairy cooperative, it's our responsibility to ensure children have access to the health benefits of milk and never miss out on a nutritious breakfast," says Gregersen. Arla has donated over 950,000 Arla Cravendale milk vouchers and 150,000 liters of milk, equating to almost 8.5 million bowls of cereal.

In conclusion, Arla has solidified its presence, built trust among customers, and positioned itself as a responsible and forward-thinking brand.

*Case based on an interview with Marianne Gregersen, Commercial Sustainability Manager, Arla Foods*

*Core business: Dairy products.*

### ARLA FOODS' TOP EXPORT ADVICE

- Use data to inform sustainability actions as 'what gets measured gets done'.
- Take steps to be on the forefront with market needs to strengthen competitive edge.
- Develop strong relationships and collaborate closely with customers to make a difference.



<sup>3</sup> The Science Based Targets Initiative (SBTI), a collaboration between CDP, the UN Global Compact, WRI, and WWF, helps companies set science-based emissions reduction targets that align with the goals of the Paris Agreement.



# CLIMATE



# Climate on the world agenda

## Perceptions of the agriculture and food sector's relation to climate

The agriculture and food sector undoubtedly has an intertwined relationship with the climate. Emissions from the sector directly affect the climate. Changes to the climate directly affect food production through increasingly unforeseeable and extreme weather conditions. Furthermore, climate change can threaten food safety by affecting the availability, accessibility, and quality of food.

In recent years, the climate has been more on the world agenda than ever before. As a result of broad political support, the sector faces increasingly regulated requirements on greenhouse gas emissions, both nationally and from the EU. Most recently, the government and the parties of the Tripartite Agreement has reached a historic deal to transform Denmark's land use and agricultural production, including a new tax on livestock emissions, to significantly reduce greenhouse gas emissions<sup>4</sup>.

While these compliance requirements present transitional challenges for Danish agriculture and food production, they also offer significant opportunities. They enable and urge Danish companies to become market leaders in the area. As leaders in climate-smart agriculture, Danish companies can set sector standards and influence

global policies and practices. In addition, this has great economic potential by boosting exports to markets that prioritize sustainability.

Thus, it is crucial to obtain a better understanding of the relationship between the sector and the climate from the perspective of decision-makers in key markets. By understanding initiatives, products, and solutions related to climate, the Danish agriculture and food sector can advance its market position globally.

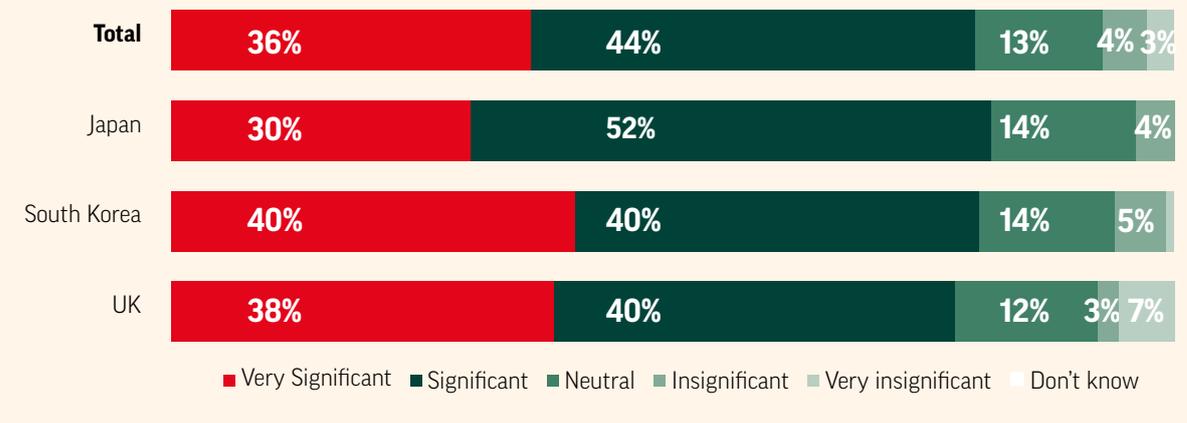
This year, Food Nation has surveyed decision-makers from Japan, South Korea and the UK about their assessment of the agriculture and food sector's relation to climate to get market specific insights for Danish companies and stakeholders to use.

### A significant sector for the climate

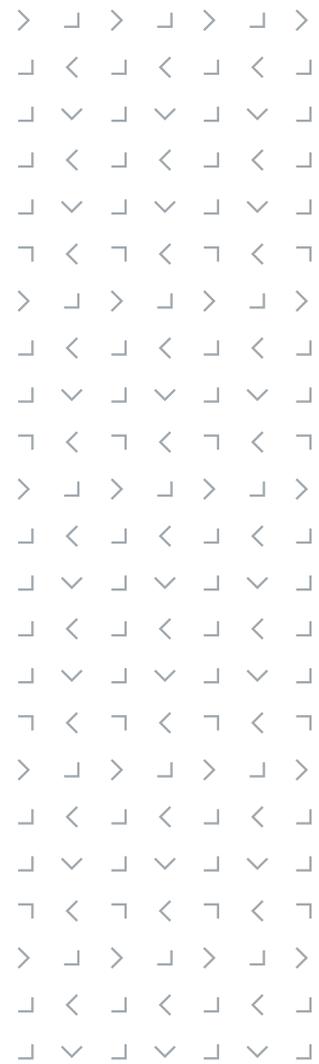
According to roughly 8 in 10 decision-makers across Japan, South Korea and the UK, the agriculture and food sector plays a significant or very significant role in reducing greenhouse gases globally. It is worth noting that the differences between the surveyed countries in this regard is minimal, ranging from 78% in the UK to 82% in Japan.

This highlights a broad, crossnational awareness of the sectors' impact on the climate, which

Figure 9.  
How significant in terms of greenhouse gas emission, decision-makers finds the global agriculture and food sector.



<sup>4</sup> <https://oem.dk/nyheder/nyhedsarkiv/2024/juni/regeringen-og-parterne-i-groen-trepart-indgaar-historisk-aftale-om-et-groent-danmark/>



is a crucial factor for driving collaborative efforts and strategic actions aimed at achieving substantial environmental progress. This consensus highlights the urgency of implementing effective measures to address emissions from the agriculture and food sector.

In this context, it is essential that companies invest in and document their sustainability efforts. As highlighted by Executive Director Nanna Callisen Bang, Ethical Trade Denmark: “We cannot simply tell a good story about how green we are in Denmark. With the new EU legislation, it requires documentation and data, as well as having solid systems in place. This will be increasingly scrutinized by stakeholders and business partners, so it’s the last call to start taking action.”

This will help ensure transparency and credibility in climate action. The widespread recognition of the sector’s environmental impact presents commercial opportunities for Danish companies. By adopting and developing sustainable products and solutions, companies can not only contribute positively to the environment but also increase their export potential.

#### **Danish products and solutions seen as having a lower environmental impact**

The perception of Danish products and solutions is a crucial factor for the export potential of Danish companies. When surveyed, 24% of decisionmakers from the three countries associate Danish agriculture and food products with a low environmental impact. To provide context, it is worth comparing this with the decision-makers’ perception of their own domestic markets.

Across decision-makers from the sector in Japan and South Korea, Danish agriculture and food products and solutions are perceived to have a lower environmental impact than domestic products and solutions. Specifically in Japan, Danish products and solutions are 12 percentage points more associated with having a low environmental impact than domestic products and solutions. This difference is even more pronounced in South Korea, where Danish products and solutions are perceived as having a 14 percentage point advantage, whereas UK decision-makers perceive their domestic products to have a similar environmental impact as Danish products.

Yo Miyashita, Head of F&B Biosolutions at Novonesis in Japan and Korea, explains how

Japanese decisionmakers generally have a positive impression of Denmark. They see it as an advanced country with a strong focus on sustainability. However, Japanese agriculture and food companies themselves struggle with lower profit margins, making it difficult to invest in sustainability.

“*When you run a business with low margins, it’s hard to focus on sustainability.*”

*Yo Miyashita, Head of F&B biosolutions at Novonesis in Japan and South Korea*

This significant perception gap highlights a strong relative environmental reputation of Danish agriculture and food products, reinforcing their competitive edge in East Asian markets. This favorable perception can be leveraged to enhance export opportunities and strengthen Denmark’s position as a leader in sustainable agriculture and food production.

#### **Impactful initiatives**

Targeted initiatives that reduce greenhouse gas emissions in the agriculture and food sector are essential not only for mitigating climate change, but also for ensuring the environmental, economic, and social sustainability. Initiatives protect the planet, secure food supplies, drive innovation, and meet regulatory and consumer demands, positioning the sector for a sustainable future.

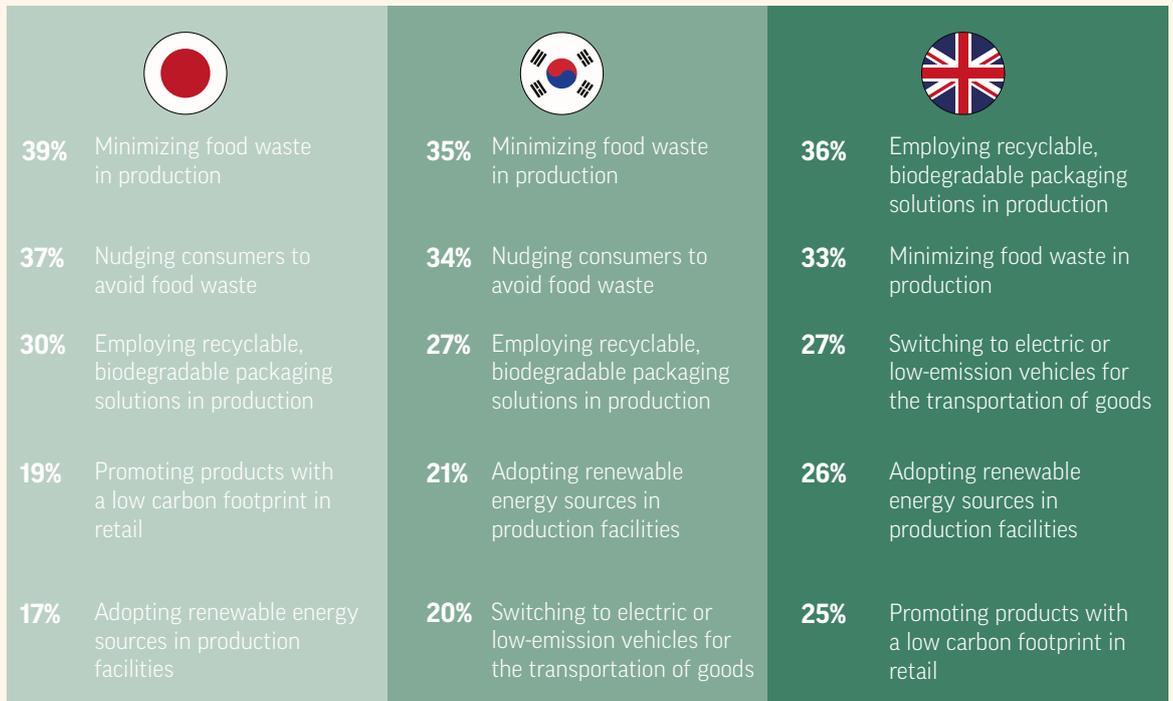
An example of such an initiative is Arla’s partnership program: “Our FarmAhead™ Customer Partnership is aimed at accelerating sustainability efforts on farms and helping customers achieve their reduction targets for scope 3”, states Marianne Gregersen, Commercial Sustainability Manager at Arla Foods.

In this year’s survey, the decision-makers were asked which initiatives they believe would have the biggest impact on the ability to reduce greenhouse gases of the agriculture and food sector, in their home country.

Overall, their answers indicate that reducing food waste, recycling in production, and use of renewable energy are perceived as factors having the biggest impact on the agriculture and food sector’s ability of reducing greenhouse gas emissions nationally (figure 10 next page).



Figure 10. Most impactful initiatives per country for reducing greenhouse gases in the agriculture and food sector, according to decision-makers.



Food waste is considered as having the biggest impact – both in production and retail. 35% of decision-makers across the three surveyed markets mentioned minimizing food waste in production, 31% mention employing recyclable, biodegradable packaging solutions in production, while 29% mention nudging consumers to avoid food waste. Subsequently comes renewable energy and low-emission transportation. Here, adopting renewable energy sources in production facilities and switching to electric or low-emission vehicles for the transportation of goods are selected.

Most similarities exist between Japan and South Korea with an identical top three initiatives. This indicates that Danish companies can position themselves positively in these markets with increased focus on food waste and sustainable packaging solutions.

Given that three of the top five attributes relate to the production stage of the value chain, Danish

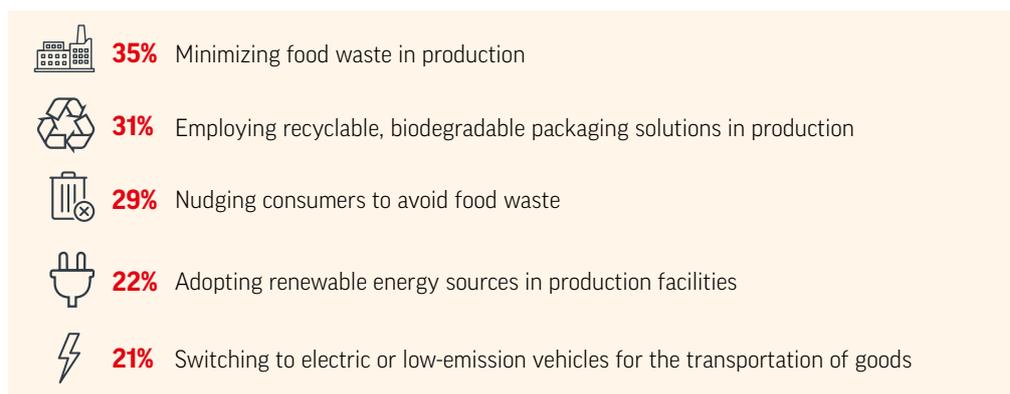
companies could prioritize initiatives that enhance sustainable practices in production, which could, in turn, be leveraged as a key differentiator in branding and marketing efforts.

### Products and solutions that aim to reduce greenhouse gas emissions

In this year's survey, we asked sector decision-makers from the selected countries to what extent they agreed with statements about products and solutions that aim to reduce greenhouse gas emissions.

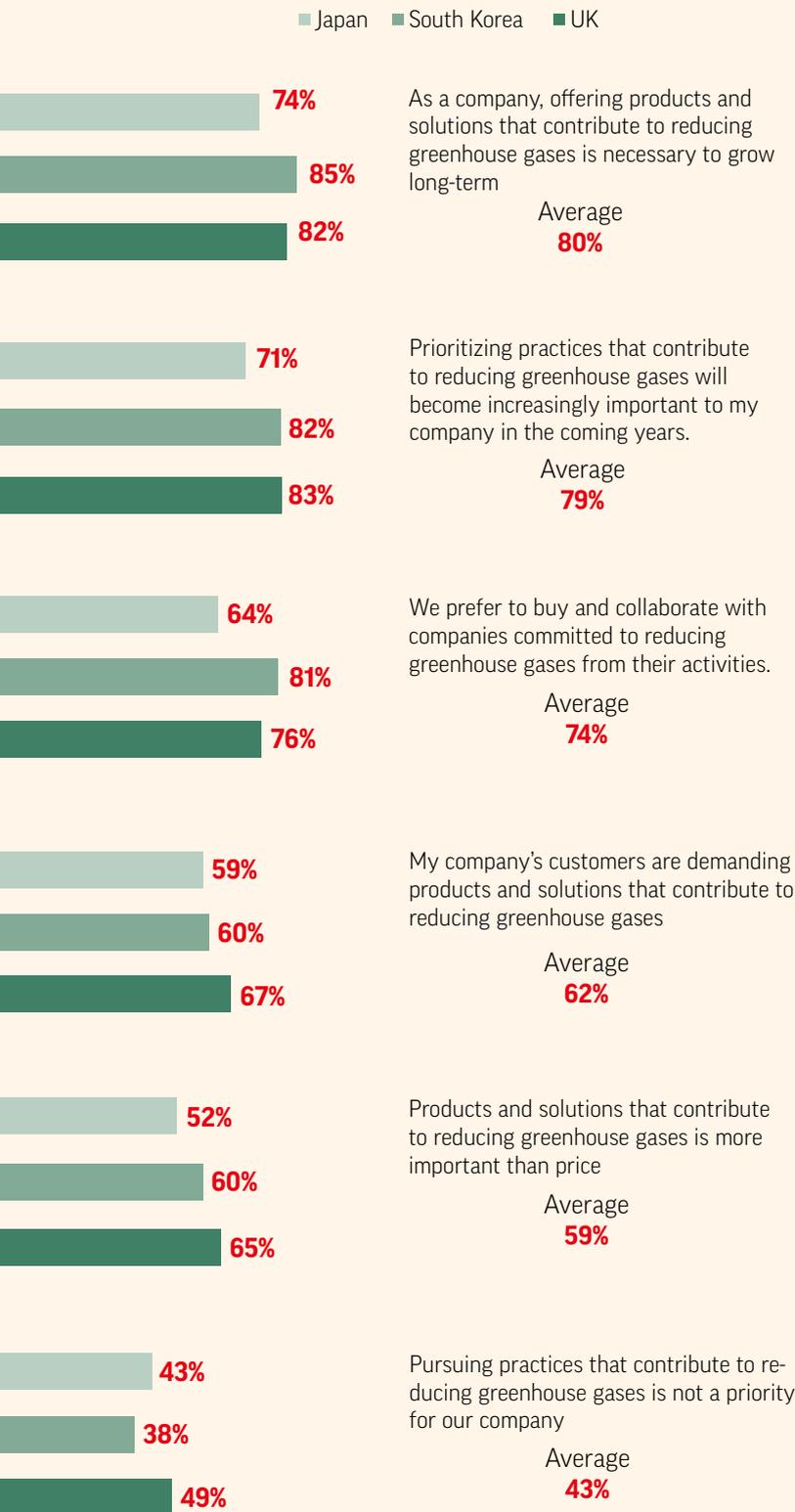
In reference to medium to long term solutions, the results show that 8 in 10 decision-makers agree or strongly agree that as a company, offering solutions that contribute to reducing greenhouse gas emissions is necessary to long-term growth. Similarly, about 8 in 10 decisionmakers agree or strongly agree that prioritizing practices that contribute to reducing greenhouse gas emissions will become increasingly important for their company in the coming years.

Figure 11. Most impactful initiatives across the three markets for reducing greenhouse gases in the agriculture and food sector, according to decision-makers.



## DECISION-MAKERS' LEVEL OF AGREEMENT TO VARIOUS STATEMENTS ON GREENHOUSE GAS REDUCTIONS.

Figure 12. Decision-makers' level of agreement to various statements on greenhouse gas reductions.



These results are significant, as they indicate a broad, cross-national recognition of the long-term importance for companies to provide products, practices, and solutions that aim to reduce greenhouse gas emissions.

For these results, there are some substantial differences between the surveyed countries. The Japanese sector is less keen on the climate agenda relative to South Korea and the UK. However, nearly half of the surveyed decision-makers from the British companies do not prioritize greenhouse gas emission reductions.

For statements related to products and solutions, about 3 in 4 decisionmakers agree or strongly agree that they prefer to buy and collaborate with companies committed to reducing greenhouse gas emissions. This has implications for the importance of solid CSR and ESG policies<sup>5</sup> for companies in the sector. This particularly applies to the South Korean decisionmakers.

On the demand side, 62% agree or strongly agree that their company's customers are demanding products and solutions that contribute to reducing greenhouse gases. This is most pronounced among British decision-makers. 59% agree or strongly agree that products and solutions that contribute to reducing greenhouse gas emissions are more important than price.

Overall, these results indicate that there is a consensus on the importance of sustainable company practices, which are expected to become even more crucial in the future. Consequently, companies that invest in sustainable practices and products may gain a competitive advantage in the market.

Finally, to achieve long-term reductions in greenhouse gases, collaboration across value chains is essential. Nanna Callisen Bang, Executive Director at Ethical Trade Denmark put it this way: "We need to work on dialogue and collaboration with the key stakeholders in the value chain. By collaborating, companies can develop and implement effective solutions that not only meet regulatory requirements but also drive innovation and sustainability."

<sup>5</sup> ESG: Environmental, Social, Governance. A term for the three areas that companies measure and report on in their sustainability efforts. CSR: Corporate, Social, Responsibility. A broader term for the company's social responsibility and the overall plan for sustainability seen in a cultural context.

## Summary of recommendations for branding climate solutions in export markets

- **Prioritize climate-responsible products for long-term growth**  
Danish companies can leverage the Danish brand as having a lower environmental impact and tap into the demand for solutions and products that support the reduction of greenhouse gases. Solutions that help reduce food waste and increase renewable energy have the biggest potential.
- **Utilize the significance of the sector for the climate to drive export**  
Decision-makers broadly recognize the sector's significant role in reducing emissions. This should be utilized by exporters to coordinate actions that aim to implement enhanced sustainability practices to reduce the sector's carbon footprint and increase export potential.
- **Maximize impact through targeted sustainability initiatives**  
Develop impactful initiatives focused on food waste reduction, recycling in production, and the adoption of renewable energy sources and tell how you work with these initiatives, as they are perceived to have the most significant impact on reducing greenhouse gas emissions in the agriculture and food sector nationally in the surveyed markets .
- **Enhance transparency and compliance with robust data management**  
To improve transparency in their sustainability efforts, Danish companies must invest in robust data management systems capable of generating reliable and valid data. This will help companies meet the stringent requirements of new EU legislation and commercialize sustainable initiatives effectively.

### MARKET SPECIFIC DEEP DIVES

Follow the QR code or link below to read three brief and separate market deep dives for the Japanese, South Korean and UK markets - among others.



[Link to Market Deep Dives](#)

### CHECK OUT OTHER PUBLICATIONS

Follow the QR code or link below to continue reading our whitepapers about how the Danish Food cluster contributes to a more sustainable global food sector.



[Link to Food Nation's publications](#)



A close-up photograph of a person's hand holding a banana plant's root system. The hand is wearing a silver watch and a gold ring. The root system is covered in dark soil and has many fibrous roots extending downwards. The background is a blurred green field of banana plants.

# STRONGHOLDS AND SECTORS

# STRONGHOLDS AND SECTORS

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

## CLIMATE

Denmark is a leader in the transition to carbon-neutral food and agriculture. Through innovative practices and technologies, the Danish food sector reduces greenhouse gas emissions while enhancing productivity. Denmark's commitment to climate goals ensures sustainable and efficient food production, positioning Denmark as a global role model in food production.

## 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.

## 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.

## 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.

## 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.

## BIOSOLUTIONS

Denmark is a leader in developing biosolutions for agriculture and food, supported by comprehensive research and public-private collaboration. Advanced technologies like fermentation and biorefining are central to Denmark's industrial ecosystem, making it a European hub for innovative companies addressing key global challenges.

## 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.

## 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 CO<sub>2</sub> emissions and increase efficiency, while maintaining the highest levels of food quality and safety.

*Interested in reading more about the strongholds and sectors of the Danish agriculture and food cluster? Follow the QR code or weblink to download Food Nation's inspiring materials.*



[Link to Food Nation's toolbox](#)

# 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 agriculture and food products and solutions that are 'Made by Denmark'.

## OBTAINING THE DATA

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

## FREE MARKETING MATERIALS & TOOLS

Food Nation provides Danish companies with insights and marketing materials to support their export journey.

Follow the QR code or the link below to access:

- Previous Insight Reports
- Published white papers on food export
- Fact sheets and industry facts
- On-demand webinars

## EXPERIENCE THE VISITOR CENTRES

Food Nation welcomes international delegations to its visitor centres in Copenhagen and Aarhus, where an interactive tour will introduce you and your business partners to the strongholds and sectors of the Danish agriculture and food cluster.

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



[www.foodnationdenmark.com/toolbox](http://www.foodnationdenmark.com/toolbox)

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