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**Report Highlights:**

Although a small market in the European Union, Denmark offers export opportunities for U.S. exporters of wine, seafood, tree nuts, and several other products. The exporter guide focuses on Consumer Oriented Products and Seafood products and provides practical tips for U.S. exporters on how to conduct business in Denmark.

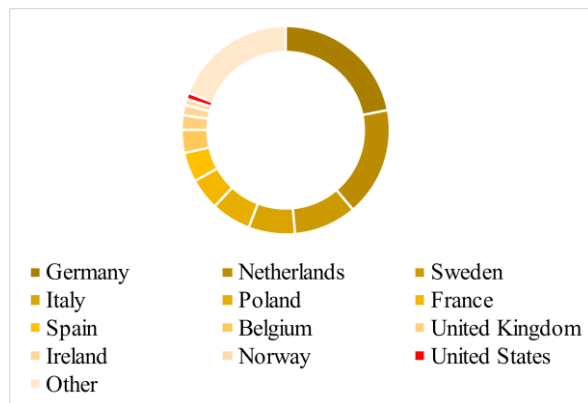
**Market Fact Sheet: Denmark**

Executive Summary:

Denmark, a Member State within the European Union (EU), is a high-income country in Scandinavia. The country’s open economy is dependent on foreign trade and the government supports a relatively liberal trade policy. Its population totaled almost six million in 2023.

Imports of Consumer-Oriented Products:

Products from other EU Member States lead Danish imports of consumer-oriented products. In 2023, the United States was the 12<sup>th</sup> largest supplier of these products to Denmark, with imports valued at over \$104 million.



Source: Trade Data Monitor

Food Processing Industry:

Denmark’s food and beverage industry comprises over 1,500 companies with a collective turnover of over \$30 billion. Denmark is one of the world’s leading exporters of meat products, in particularly pork. Other notable Danish exports include cheese, food preparations, and seafood (salmon).

Food Retail Industry:

The Danish retail sector is rather consolidated, with Coop, Salling, and Dagrofa dominating the market. In 2023, exports of consumer-oriented products totaled \$14.2 billion. Denmark continues to be a price sensitive market and the Danes spend about ten percent of their disposable income on food and beverages. The sector’s turnover for 2023 is forecasted \$16 billion.

Foodservice – HRI Industry:

Despite the rising costs of living, the foodservice industry’s turnover is back on track. Consumers returned en-masse to HRI foodservice outlets. Last year, total sales were valued at \$9.2 billion and exceeded the pre-pandemic level.

Quick Facts CY 2023

Imports of Consumer-Oriented Products, total:  
\$10.1 billion

List of Top 10 Growth Products in Denmark (imported from the World):

- |                   |                         |
|-------------------|-------------------------|
| 1. Dairy products | 6. Pork products        |
| 2. Bakery goods   | 7. Food preparations    |
| 3. Wine           | 8. Fresh vegetables     |
| 4. Fresh fruit    | 9. Processed vegetables |
| 5. Beef products  | 10. Cocoa products      |

Food Industry by Channels 2023, in \$ billion:

Consumer-Oriented Products Imports	\$10
Consumer-Oriented Products Exports	\$14
Agricultural & Related Products Imports	\$22
Agricultural & Related Products Exports	\$26
Food Industry	\$30
Food Retail	\$16
Food Service	\$9

Top 10 Food Retailers in Denmark:

SuperBrugsen	Meny
Spar	Føtex
Netto	Rema1000
365discount	Lidl
Bilka	

GDP/Population:

Population: 5.9 million  
GDP: \$415 billion  
GDP per capita: \$70,368

Strengths/Weaknesses/Opportunities/Challenges

Strengths:

U.S. producers offer a great variety of food products with a consistent quality and have a great story to tell about sustainability.

Weakness:

Transatlantic transportation is costly and takes time. Some U.S. food products suffer from a negative perception among the Danes.

Opportunities:

The Danish processing industry increasingly demands U.S. seafood. Strong demand for U.S. wines in environmental-friendly packaging and products that are healthy and nutritious.

Threats:

There is fierce competition on price, quality, uniqueness, and innovation from other EU Member States.

*Data and Information Sources: Trade Data Monitor, industry experts, company websites*

*Contact: FAS The Hague, [agthehague@usda.gov](mailto:agthehague@usda.gov)*

## SECTION I. DETAILED MARKET OVERVIEW

### Macroeconomic Situation

Denmark is a small country with just under six million inhabitants. The Danish labor force totaled just over three million people at the end of 2023, and approximately 32 percent are employed in the public sector. Denmark's OECD-harmonized unemployment rate was 5.3 percent in January 2024, lower than the EU-27's average rate of six percent but above the OECD average of 4.8 percent. The labor force participation rate is among the highest in the world. In the fourth quarter of last year, 81.2 percent of working-age population participated in the labor force, and the employment rate was 77 percent.

Many independent observers regard Denmark as one of the world's most attractive business environments and the country ranks highly in indices measuring political, economic, and regulatory stability. Denmark is a constitutional monarchy which shares a southern border with Germany and is connected, via a bridge, with Sweden. The country has been a member of the European Union (EU) since 1973. It maintains a fixed exchange rate policy, with the Danish Krone linked closely to the Euro. Denmark is a social welfare state with a thoroughly modern market economy heavily driven by trade in goods and services. It has one of the highest GDP's in the world. More information can be found in the Investment Climate Statement, <https://www.state.gov/reports/2023-investment-climate-statements/kingdom-of-denmark/>

Table 1: Advantages and Challenges for U.S. Exporters in Denmark

<i>Advantages (U.S. supplier strengths and market opportunities)</i>	<i>Challenges (U.S. supplier weaknesses and competitive threats)</i>
American products are known for their good and consistent quality.	Denmark is a price sensitive market; discount supermarket chains dominate the food retail landscape.
Although a small consumer market, the Danes are affluent and open-minded consumers.	Transatlantic transportation is costly and takes time. Competition from suppliers from EU Member States.
Denmark has the world's highest per capita consumption of organic certified products.	Sustainability standards are often a requirement of the Danish food retail industry (e.g. MSC, ACS, etc.).
Interest in experimenting with new and innovative products and/or concepts.	Standard U.S. product labels do not comply with Danish product label requirements.
Denmark has a sophisticated and well-developed seafood and food processing industry.	Certain meat and meat products and products containing GMO derived ingredients that are not EU approved cannot be exported to Denmark.

## SECTION II. EXPORTER BUSINESS TIPS

Most businesspeople in Denmark speak English and have a high level of education (i.e., a Masters or Bachelor's degree). The Danes are straightforward, business-minded, and do not seem to like hierarchy. Before conducting business, they like to be well-informed about their future business partner, the product in question, and its price. They can be quick decision makers and value long-term partnerships. The Danes expect timely responses, for instance within 48 hours. Communication takes place preferably by either email or WhatsApp. In Section IV General Consumer Tastes and Trends will be further discussed.

Success in introducing a product in the Danish market predominantly depends on an exporter's level of knowledge of the market and competition, the Danish food culture as well as the relationship the exporter has with the local importer.

It is recommended to contact your [State Regional Trade Group](#) (SRTGs). There are four SRTGs (SUSTA, WUSATA, Food Export-Midwest, and Food Export-Northeast) in the United States and they cover all States. In addition, it is advisable to contact [U.S. commodity trade associations](#) that covers your product(s) as well as the [National Association of State Department of Agriculture](#). The wine institute is the only U.S. commodity trade association that has a local representative in Denmark. However other U.S. commodity trade associations are all active in Denmark. All these organizations have an excellent international network, local representatives, a wealth of experience, and often organize trade related events.

Trade shows are excellent venues for U.S. exporters to meet potential Danish buyers, to conduct product introductions, and to gauge buyer interest. Depending on the products, U.S. exporters should consider visiting or exhibiting at one of the many trade shows in Europe. The only food trade show taking place in Denmark is the Food Expo. This biennial show takes place in Herning, Denmark and focusses strongly on the Danish Hotel, Restaurant, and Institutional (HRI) foodservice industry. FAS The Hague visited Food Expo in March 2024 and a detailed report on it can be found [here](#).

### SECTION III. IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

The vast majority of Danish food legislation is harmonized at the EU level. Where EU regulatory harmonization is not yet complete or absent, imported products must meet existing Danish requirements. U.S. exporters should be aware that national measures still exist for enzymes, processing aids, packaging waste management, food contact materials, choice of language (Danish is the official language in Denmark), use of stickers, samples, novel foods, fortified foods, irradiated foodstuffs, and product registration.

Nevertheless, it is highly recommended that U.S. exporters verify the full set of import requirements with their local buyer, who is in the best position to research such matters with local authorities, before shipping any goods. Final approval of any product is subject to the Danish rules and regulations as interpreted by border officials at the time of product entry. More information can be found on the website of the [Danish Veterinary and Food Administration](#).

Information about customs clearance, required documentation for imported products, labeling requirements, tariff information and FTAs, and trademarks and patent market research can be found in the EU Food and Agricultural Import Regulations and Standards (FAIRS) Country Report and Certificate Report which can be downloaded from the following website:

<https://gain.fas.usda.gov/#/search>.

### SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

#### *Food Retail Sector:*

The turnover of the Danish food retail industry is estimated at almost \$16 billion (DKK 110 billion). The Danish food retail is consolidated, with four large buying groups (COOP, Salling, Reitan, and Dagrofa)

controlling the majority of the market. Most supermarkets in Denmark operate on an average floorspace between 500 and 1,500 m<sup>2</sup>. The Danes spend about ten percent of their disposable income on food and beverages.

It is said that Denmark has the highest number of supermarkets per inhabitant within the EU. In most of the cities there is a close density of shops which makes visiting a supermarket easy and convenient. The Danes visit their supermarket on average almost three times per week and per visit, they spend about half an hour per visit. The market for online sales is still quite small.

An average supermarket in Denmark has a limited selection of U.S. products. The most prominent product from the United States is wine, followed by a selection of sauces and dressings, peanuts, almonds, sweet potatoes, raisins, dried cranberries, frozen seafood products, and whiskies.

#### *HRI Foodservice Sector:*

In 2022, the HRI foodservice industry sales in Denmark rebounded and exceeded the pre-pandemic levels. While sales continued to grow in 2023 it was at a significantly slower rate compared to the previous year. In 2023, sales were estimated at \$9.2 billion (DKK 64.6 billion). According to Euromonitor International (Euromonitor), a market research provider, “Many Danish consumers were pushed to contemplate their purchases more carefully amid the impact of elevated inflation and significant price increases with more people switching to home cooking to save money. However, at the same time, there still remained a significant number of consumers who consider consumer foodservice to be an integral part of their lifestyle and who were willing to allocate resources to it.”

Unlike the retail sector, the Danish foodservice industry is fragmented and has many independent players. This is especially the case for cafés/bars, restaurants, cafeterias, and street stalls/kiosks. Most limited-service restaurants and delivery outlets, however, are consolidated and often part of an international chain.

The Danish HRI foodservice industry is facing several challenges. Many foodservice outlets are struggling to find staff because former workers found a different job during lockdown, as well as the very tight labor market in Denmark. Also, foodservice entrepreneurs have seen food prices go up which forced them to increase prices on their menu but at the same time impacted margins. The industry has also been confronted with a large increase in production costs, including those of packaging materials, transport (containers), and energy. Finally, the foodservice industry is facing competition from food retailers that now also offer ready-made sandwiches, fresh juices, and prepared meals.

Danish wholesalers and distributors, leading suppliers to most HRI foodservice entrepreneurs, prefer to work with Danish importers that are specialized in buying U.S. products, due to strict EU import requirements and standards. [Euro Cater](#) and [Dansk Cater](#) dominate the Danish wholesale sector:

#### ***Market Trends:***

##### *Discount Market:*

Denmark continues to be a price sensitive market. Many Danes look to save on their grocery shopping due to the rising costs of living. They are always on the look-out for the best price, grocery products on sale, and value for money. Discount stores, including Netto, Rema 1000, and Lidl, lead the market as they make up 60 percent of all supermarket formats.

### *Private Labeled Products:*

With a market share of 36 percent, the market for private labeled products in Denmark is strong. Several retailers in the Danish market have developed two private labels: one focused on price and the other on enhanced quality. Consumers appreciate the value-for-money that private label brands are offering and that they can be an economical alternative to A-branded products. More information on the European private label market can be found on <https://www.plmainternational.com/private-label-today>.

### *Voluntary Front of Pack Nutritional Labeling: Keyhole:*



Denmark has been working together with Norway and Sweden to develop and implement a joint Nordic nutrition label – the Keyhole. The label certifies that a product has met certain requirements for salt, sugar, fat, and fiber content. The aim is to make it easier for consumer to find and choose healthier foods. The Keyhole is a voluntary label and food producers are themselves responsible for ensuring that foods with the keyhole symbol conform to [The Danish Veterinary and Food Administrations regulations on use of the keyhole](#). More information about

voluntary front of pack nutritional labeling can be found here, [https://food.ec.europa.eu/safety/labelling-and-nutrition/food-information-consumers-legislation/nutrition-labelling\\_en](https://food.ec.europa.eu/safety/labelling-and-nutrition/food-information-consumers-legislation/nutrition-labelling_en).

### *Deposit and Return System:*

Denmark introduced a deposit and return system to collect valuable material which can be recycled and to prevent cans and bottles from ending up in the environment. The Danish deposit mark can be recognized by its logo which has a series of dots under two arrows in a circle. The deposit mark is a registered trademark ® owned by [Dansk Retursystem](#). The deposit mark, see below, may be printed directly on the bottle or can. For U.S. exporters of (alcoholic) beverages is it good to know that it may also be a small sticker attached to the bottle or can.



### *Plant-based Food Action Plan:*

In October 2023, the Ministry of Food, Agriculture, and Fisheries in Denmark launched the [Danish Action Plan for Plant-based foods](#): “If we want to reduce the climate footprint within the agricultural sector, then we all have to eat more plant-based foods.” The plan highlights the importance of plant-based foods in making the country's food system more environmentally friendly. Denmark has seen a big increase in people looking for plant-based products, and this has become a noticeable trend in the foodservice industry too.

### *Home Delivery:*

An increasing number of consumers are placing orders for home delivery through third party delivery platforms. Younger consumers are particularly comfortable in using mobile apps on their smartphones to order and pay for this service, as it offers greater convenience. Delivery scooters and bicycles are working overtime in Denmark. [Just Eat Takeaway](#) leads the market for meal delivery from various HRI

foodservice outlets to consumers in Denmark. Home delivery is expected to continue to be driven by convenience as many consumers lead more home-centered lifestyles.

### *Markets:*

#### *Organic Market:*



Last year, the organic market in Denmark was estimated at over \$2.5 billion and is the seventh largest organic market within the European Union (EU). The annual per capita consumption of organic products is about \$500 and the highest in the world. In fact, Denmark has the world's highest organic share (13 percent) and the most well-developed organic market. On average, three out of four Danes buy organic food every single week indicating that organic is for everyone. Fresh produce makes up more than one third of the organic sales and thereby constitutes the largest organic product category. This is followed by dairy, that makes up one fifth of the organic sales. With almost 90 percent, the Danish retail sector makes up for the largest part of the total organic sales.

[The unique and governmentally certified Ø-label](#) has been very important for the widespread success that organic food products have achieved in Denmark. Sales of organic products are expected to remain strong due to keen interest in healthy, nutritious, and sustainably produced food products combined with a general trust in the [Ø-label](#). There is a loyal group of consumers that want to prioritize organic products and the values behind that choice, a choice that is not based on price. More information can be found in the [2024 EU Organic Market](#) report.

#### *Seafood Market:*

The [Danish Seafood Association](#) (DSA), the umbrella organization for the Danish seafood industry, started its activities in 2010 and now has 129 active members within the processing and trading of seafood products. DSA is the voice of the collective Danish seafood industry in its dialogue with the Danish authorities, press, as well as with the [pan-European fishing industry association, AIPCE-CEP](#).

According to the [European Market Observatory for Fisheries and Aquaculture Products](#) Denmark was the third largest producer of fishery products and the eight largest on aquaculture production within the European Union. The Danish seafood industry is concentrated in the Province of Jutland. Its fishing fleet consist of almost 1,900 vessels while its main species landed, in volume, are European sprat, herring, and sand eel. Popular farmed species include trout and mussels.

Increasingly, Denmark's seafood processing industry depends on imported raw material. The availability of local seafood species has decreased due to rising fuel prices, Brexit, depleting stocks in the Baltic Sea, offshore wind farms in the North Sea, and the creation of [marine Nature 2000 sites](#).

It is an international oriented industry. Last year, Danish seafood imports totaled nearly 1.3 million MT - of which 70 percent originated from outside the EU. The largest non-EU suppliers, by volume, were Norway, Greenland, Faroe Islands, Iceland, the United Kingdom, and the United States. About a quarter of fish imports were seafood products, unfit for human consumption, that are used for fish feed. The second and third largest imported seafood product are (Atlantic) salmon and herring, respectively.

The United States was Denmark's ninth largest supplier of seafood in 2023 (19,000 MT or almost two percent of total imports). Trade was dominated by frozen Alaska Pollock (AP) which represented almost

40 percent of the seafood products imports from the USA and is used by Danish seafood processing companies. Other products imported from the United States were fish fats and oils, shrimp and prawns, fish feed (flours, meals, pellets, and livers), cod, and wild salmon.

The United States has proven to be a reliable supplier of seafood products to Denmark and in particular of whitefish species. There are opportunities for U.S. seafood companies on the Danish market as the availability of local seafood species is decreasing and the EU's [2024-2026 ATQ](#) (Autonomous Tariff Quota) added new species (of which some are available in U.S. waters) to its quota and excluded Russia and Belarus.

#### *Wine Market:*

Denmark is home to an estimated 1,500 importers of wine. While most of these importers import wine as a part time occupation, there are a dozen that lead the importer market. Denmark provides good sales opportunities for U.S. wines. In 2023, Danish wine imports were valued at \$772 million, with half of the volume originating from either Italy or France. While not equal in volume, wine from Spain, the United States, Germany, and Australia are also popular. The United States is the biggest non-EU supplier of wines and U.S. wine exports to Denmark were valued at \$54 million (and seven percent of the market) in 2023. According to industry sources, Denmark has the highest per capita consumption of U.S. wines, outside of the United States.



The Danish wine market is a saturated market. With about two-third of the market, red wines continue to dominate consumption, although (lighter) white wines are gaining popularity. The per capita consumption of wine is declining. There seems to be an overall growing demand for beverages with lower alcohol percentages and cocktails, especially among young consumers. Wines in environmentally friendly packaging (including light weight bottles, cans, and bag-in-box), with innovative and funky labels, and natural and organic wines are gaining popularity.

Denmark is the only country in the Nordic region where alcoholic beverages can be sold via regular supermarkets. As a result, an estimated 80 percent of wines are sold via supermarkets, with the remaining sold by liquor stores and wine boutiques like [Vin Specialisten H.J. Hansen Vin A/S](#). Special offers are important in this price conscious market as the Danes reportedly buy 70 to 80 percent of their wine when it is on sale. Due to the 25 percent Value Added Tax (VAT) in Denmark, a [tax on alcohol](#), and a tax on packaging, an estimated one quarter of the Danes purchase their wines regularly across the border in Germany which has a lower VAT percentage (19 percent) on alcohol and lower tax on packaging.

Retailers offer several labels of U.S. wines, ranging from roughly ten labels in supermarkets up to approximately 20 to 25 in wine boutiques and liquor stores. Not only wines from California but also those from Washington, Oregon, New York, and Virginia are sold on the Danish market.



### *Other Markets:*

#### *Craft Beer:*

The Danish market for beer is increasingly focusing on (local) beers from Denmark. Total beer imports dropped from over \$75 million in 2021 to almost \$57 million last year, while imports from the United States dropped in the same period from \$5.7 million to \$1.7 million. Denmark's largest breweries, as well as local micro-breweries, are experimenting and producing good quality craft beers and compete directly with craft beer from the United States. Minimum durability and transportation time and costs are other factors to take into consideration. Additionally, there is a growing demand for organic beer, alcohol-free beer, and gluten free beer.

#### *Distilled Spirits:*



The EU continues to be an important market for U.S. distilled spirits and is responsible for roughly 30% of all U.S. exports. Distilled Spirits from the United States are popular on the Danish consumer market. Well-known U.S. whisky brands can easily be found at retail outlets. More specialized wine and spirits shops have a much broader assortment of distilled spirits, including those from the United States. Last year, Danish

imports of U.S. distilled spirits totaled \$4.3 million of which three-quarter were bourbons. The consumption of distilled spirits is under pressure. The International Alliance for Responsible Drinking, <https://www.iard.org/welcome-to-iard/members-affiliations> and the World Health Organization has expressed concerns about the marketing of alcoholic beverages and the number of selling points for alcoholic beverages.

#### *Tree Nuts:*



The United States is the third largest supplier of tree nuts to the Danish market, after Germany and the Netherlands. However, these latter countries do not grow tree nuts themselves, but re-exports many imported tree nuts, including those from the United States. Like many other EU Member States, Denmark largely depends on the United States for its almond supply. Almond imports from the United States were valued at \$18 million in 2023. Actual use of U.S. almonds is expected to be much higher, due to re-exports via other EU member states (the same is also true for walnuts and pistachios). The largest Danish importers are food manufacturers, large bakeries, confectionary and snack companies.

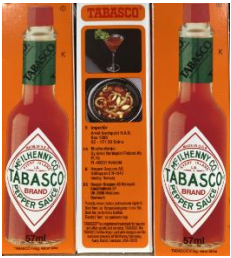
#### *Sweetpotatoes:*



Denmark's import of sweetpotatoes has stabilized for the past few years. The United States competes directly with similar products originating from Egypt, Spain, and China. Last year Denmark's imports of U.S. sweetpotatoes were valued at \$98 million. However, this data is most likely not comprehensive as Denmark also imported sweetpotatoes via the Netherlands and Germany, countries

that do not produce these products.

### Sauces and Condiments:



Several sauces and dressings from the United States, including global brands like Sweet Baby Ray's, Frank's Red Hot, Tabasco Sauce, and Caesar Cardini's, are popular in Denmark and can be found in many supermarkets. Although fluctuating, imports of these products are valued at almost \$688,000.

The Office of Agricultural Affairs in The Hague maintains lists of local buyers of among others organic products, seafood products, craft beer, distilled spirits, wine, specialty foods, tree nuts, and produce.

Table 2. Best Consumer-Oriented Product Prospects

Commodity (HS code)	Imports, million USD, 2023	Imports from U.S., million USD, 2023 (U.S. market share)	Estimated average annual import growth
Soup and other food preparations	535	9 (2 %)	10%
Processed vegetables	480	0.5 (0 %)	10%
Chocolate and cocoa products	453	0.5 (0 %)	10%
Coffee	332	0.1 (0 %)	15%
Petfood	277	0.4 (0 %)	10%

Source: [www.tradedatamonitor.com](http://www.tradedatamonitor.com)

## SECTION V. AGRICULTURAL AND FOOD IMPORTS

### *Agricultural & Food Import Statistics:*

Danish imports of U.S. agricultural and food products can be downloaded from the following website <https://apps.fas.usda.gov/gats/BicoReport.aspx?type=country>. Please make the following selection: Product Type: exports; Market Year: calendar year; Report Type: year-to-date; Country: Netherlands; Product: agricultural & related products and Download: word.

Table 2 in this report provides an overview of the best high value consumer-oriented products prospects.

## SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

If you are a U.S. interested party and have questions or comments regarding this report, need assistance exporting to Denmark or you are looking for the Foreign Buyers Lists (FBL) of various consumer-oriented products and seafood products, please contact the Foreign Agricultural Service:

U.S. Department of Agriculture's (USDA) Foreign Agricultural Service (FAS)

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## Appendix I. Leading Grocery Retailers in Denmark

<b>Purchase Group:</b>	<b>Estimated Market Share, percentage:</b>	<b>Retail chains:</b>
Coop Danmark Roskildevej 65, 2620 Albertslund, Denmark +45 4386 4386 coop.dk	30	Discount: 365discount Upscale: SuperBrugsen and Kvikly
Salling Group Rosbjergvej 33, 8220 Brabrand, Denmark +45 8778 5000 Sallinggroup.com	25	Discount: Netto Upscale: Føtex and Bilka
Dagrofa ApS Kærup Industrivej 12, 4100 Ringsted, Denmark +45 7020 0268 kontakt@dagrofa.dk dagrofa.dk	25	Upscale: Meny, Spar Min Købmand, and Let-Køb
Reitan AS Buddingevej 195, 2860, Søborg, Denmark +45 8881 6000 reitandistribution.dk	15	Discount: Rema1000 Convenience: 7-Eleven
Lidl Profilvej 9, 6000 Kolding, Denmark +45 7635 0000 lidl@lidl.dk lidl.dk	5	Discount: Lidl

Source: FAS/The Hague

### Attachments:

No Attachments