ORGANIC DENMARK

REPORT

MORE VALUE POSITIONS IN THE ORGANIC MARKET

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REPORT

MORE VALUE POSITIONS IN THE ORGANIC MARKET

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ORGANIC DENMARK

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WHAT CAN YOU LEARN FROM THE DANISH ORGANIC MARKET?

With this report we wish to share our findings, conclusions, and food trends from our latest analysis of the Danish organic market, within the three value positions, we have chosen to name “Good, Better, Best”.

Organic Denmark has been working closely together with both the retailers and organic companies in Denmark for two decades. In 2019, the Danish organic market had matured with an organic market share of 12.1%, underlining the position as world leading organic nation for the 10th year in a row.

All retailers in Denmark, from discount stores to hypermarkets, have an organic range, and we discovered that, in most categories, the best position is occupied by the private label and, in some categories, the private label occupies a whole category. Having said that, the most far-reaching example is olive oil, where we discovered that the range is so deep and wide that there is room for both brands and private labels in all three value positions.

Due to this finding, we decided to make a more in-depth analysis of the organic market. The purpose was both to get an overview of the market, and also to disseminate new knowledge to retailers and the companies, making them aware of *where* the growth in the market will take place in the future. Through deeper insight into the organic value positions and product categories, it should be very clear that bringing more organic products to the shelves, with a larger value position within each product category, strengthens access to a wider group of consumers and thus results in stronger sales growth.

We hope the report will inspire retailers, wholesalers and organic companies to look into the opportunities for growth and to expand their organic range.

Enjoy!

Pernille Bundgård
International Market Director

ORGANIC DENMARK

PREFACE

The organic market is seeing continued growth year after year, and there are more and more organic products on the retailers' shelves. This makes it relevant to work with the establishment of organic products in more value positions within the same product group.

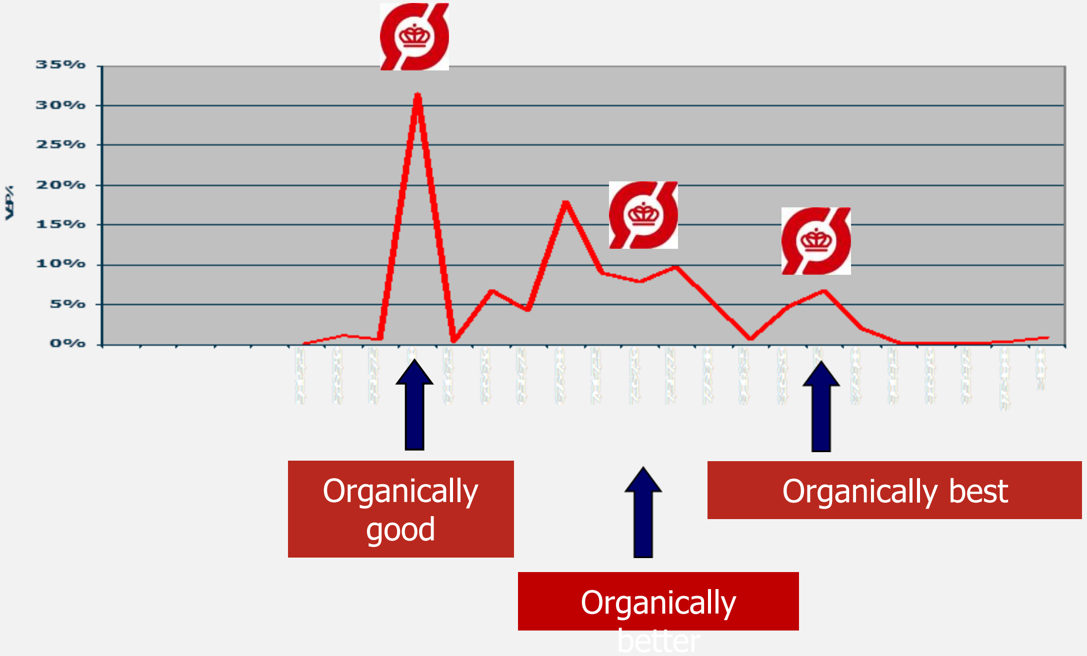
When work is targeted at establishing more value positions, this can contribute effectively to creating high involvement in the category and thus generating growth, because it becomes more interesting and relevant for consumers to be more deeply involved in the category.

When an organic range is successfully created in which there are marked differences in price and perceived quality, this creates a dynamic and positive self-reinforcing spiral which generates growth and provides room for launching even more innovative organic products.

As the report shows, private labels also play an important part in organics. It is important for both producers and retailers to think about the balance between private labels and brands to ensure continued innovativeness and growth in the organic market.

We encourage you as a reader to take inspiration from all the best practice examples in the report and to incorporate the best elements from the report in your future product development and range strategy.

Enjoy!



ORGANIC DENMARK

Birgitte Jørgensen
Chief Consultant

PURPOSE, DATA BASIS AND METHODOLOGY

Purpose
As a producer or retailer, you may be inclined to focus on the examples from your own categories, but that is not the purpose of this report.

The purpose is to provide knowledge and inspiration across the categories. As a reader, you should therefore allow yourself to be inspired by the best examples from other product areas and think: “How can my product category develop if I as a business take a cue from the trends shown in, among other categories, mushrooms, potatoes, olive oil or one of the many other examples”.

Behind the figures
The organic market share figures are taken from GfK Consumerscan and cover the period from June 2020 and 12 months back. This means that the first effects from the coronavirus situation are included.

The power of example
The report is based on studies of best practice from both Denmark and its near export markets, supplemented by interviews with businesses as well as range and purchasing managers in the retail trade. Price points have been used as the basic parameter, but, in several categories, the examples show that other parameters are beginning to make themselves felt. These may be flavour, health parameters, packaging, sustainability etc.

THE TRADITIONAL VIEW

That a product is organic has traditionally been regarded as a quality parameter in itself in Denmark, and the ranges in the retail trade have typically been composed on the basis of the below parameters:

BEST	• The ultimate taste alternative • Typically conventional
BETTER ALTERNATIVE	• A slightly better alternative to good • Typically organic
BETTER	• A slightly better alternative to good • Typically conventional
GOOD	• The cheapest alternative • Typically conventional

Today we are seeing a move away from this traditional way of thinking, as organics are increasingly spreading across more and more value positions in the individual categories, and they are no longer simply characterised by constituting the ‘better alternative’. However, this line of thought is still prevalent in certain categories, and its prevalence also varies from chain to chain.

Today, it is largely possible to find an organic variant of all products in the retail trade, and, in some categories, we are even seeing that the organic variant has outperformed the conventional variant. It is very different from store to store whether consumers only encounter one organic quality level or more within each product category. However, our assessment is that there is room and need for more quality levels in organics to ensure the continued development of organic products and to meet the demands of future consumers.

More value positions are one of the paths to growth in the organic market.

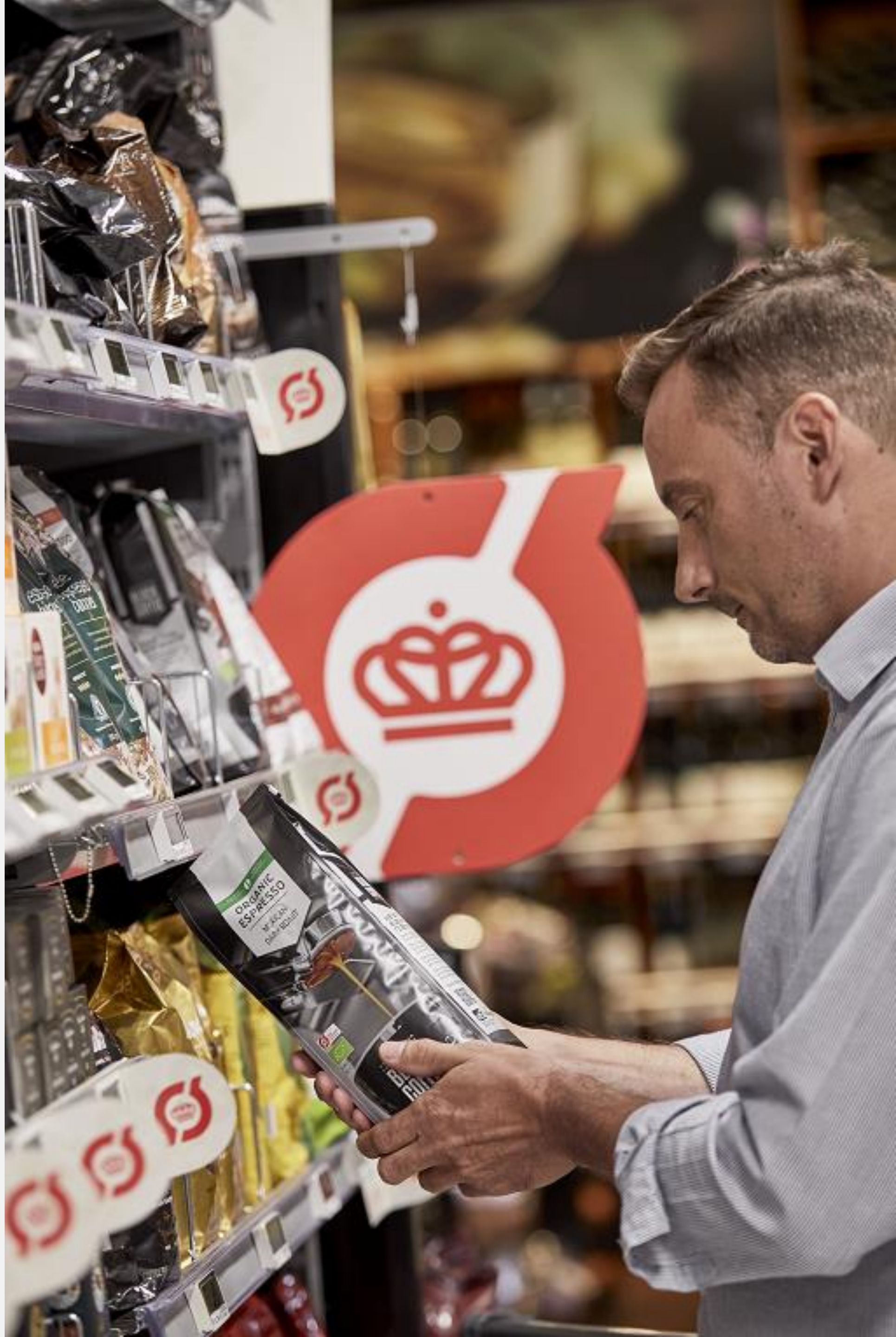
RENEWING THE TRADITIONAL VIEW

Today, organics have spread from the basic products to now also taking up more space in pleasure-oriented and more niche-oriented categories. The analyses in this project show that organic products are increasingly occupying the top positions in the range and that the breadth and depth of the range of products from the discount version to the luxury product are being expanded.

The time is therefore ripe for renewing the traditional view on value positions in the market, so that consumers no longer only find one single organic variant in the individual product category, but several.

Not all categories can accommodate three or four value positions, but there are many examples where there can easily be room for more than two value positions if the product stands out positively on one or more parameters.

There are many product categories for which more value positions have not yet been established. There is still plenty of potential for innovation and development, and this applies both within a basic category such as bread and in some of the more pleasure-oriented categories.



THE ORGANIC STAIRCASE

Consumers usually start by buying basic organic products, and they then gradually move up the organic staircase to new product categories.

Therefore, it is also natural that the basic product categories tend to have more value positions. However, the organic market has become so mature that there are also more value positions in the luxury product categories.

This is well in line with the organic staircase today being more like an escalator. Once consumers have taken the first step on the organic staircase, they continue to buy organics in more and more categories over time.

Source: The organic staircase was originally prepared by Coop.

MORE VALUE POSITIONS ARE NEEDED IN THE FUTURE

The analysis shows that there are basically three ways in which producers and retailers can bring added value to their organic product range and thus create more value positions towards the goal to double the organic market in 2030.

The best opportunities for creating more organic value positions is when one or more of these factors are in play:

- The share of organic products is high
- There are clear taste differences in the products of the category
- Packaging differences are brought into play
- There is collaboration in the value chain
- Different degrees of convenience are brought into play.

Examples of collaboration opportunities in the value chain may be to work with different flavours, breeds, varieties, animal welfare, fair trade, climate and sustainability.

Examples of a greater degree of convenience may be to work with a greater degree of sorting, cleaning, chopping and mixing within vegetables or with a greater degree of processing and packing sizes, all depending on consumption situations and household sizes.

It is clear in some categories that there is or has been one company or retail chain that has assumed the role of category captain to drive the development in a product group. Elsewhere, it may be a whole industry or category that is moving together – this applies, for example, to beverages.

MORE VALUES IN PLAY

In future, organic consumers will expect much more from organic food products, farmers and businesses. In the past 1-2 years, the focus has switched towards climate and sustainability, and organics are regarded as a matter of course. Organic consumers expect that real responsibility will be taken throughout the value chain in the future.

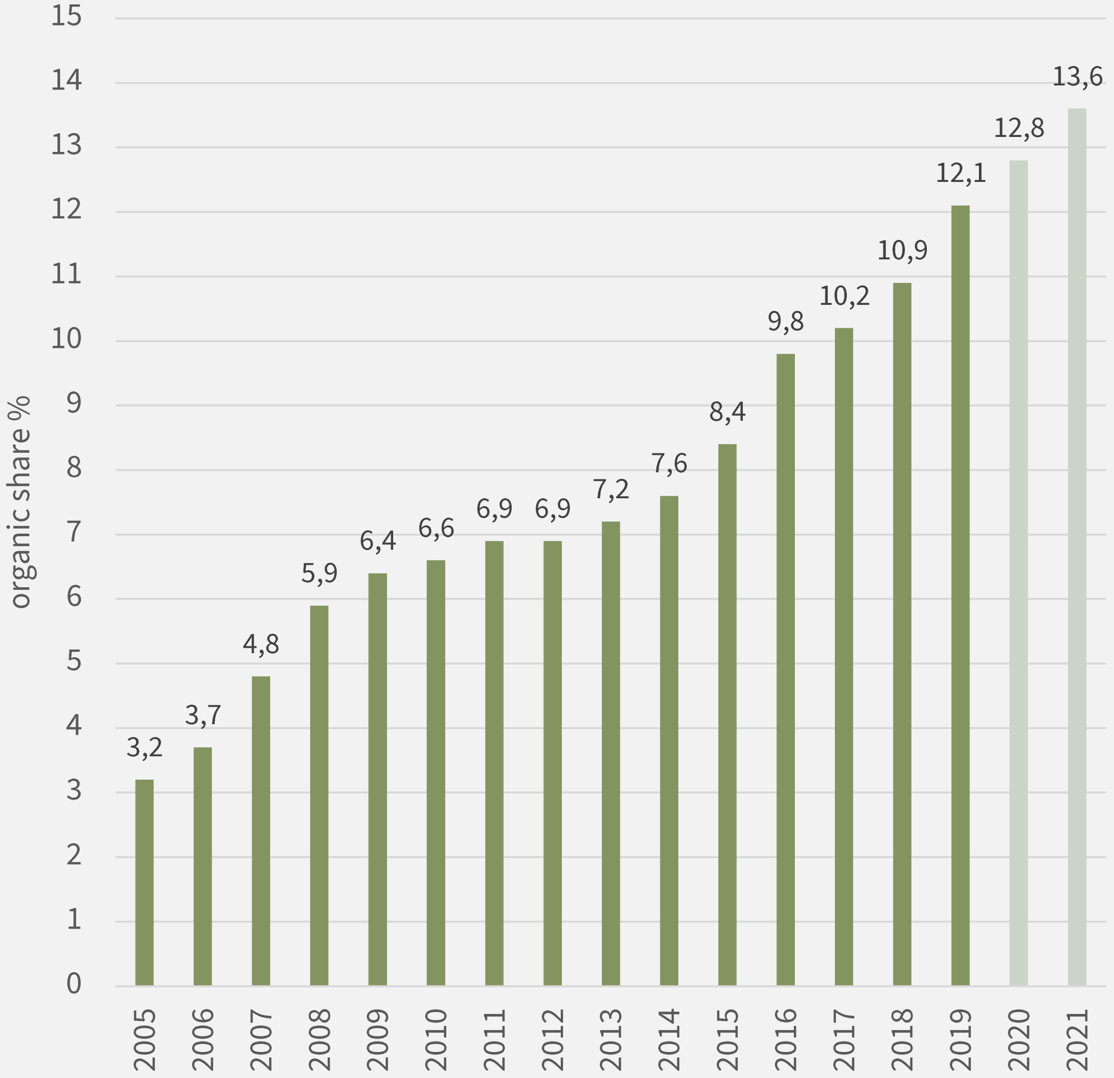
This means that the trend of bringing into play more values such as: flavours, breeds, varieties, animal welfare, fair trade, climate and sustainability will be boosted.

By adding extra layers to their organic products, farmers, businesses and food producers will have a better starting point in the negotiating situation than just price.

Organic Denmark will be working much more with precisely these issues in 2021, and we are looking forward to the dialogue on how we can develop organics, together with farmers, businesses and retailers in Denmark and abroad, towards both more and better organics throughout the value chain.

Collaboration and more organic value positions are some of the paths towards a larger organic market.

Development in organic market shares

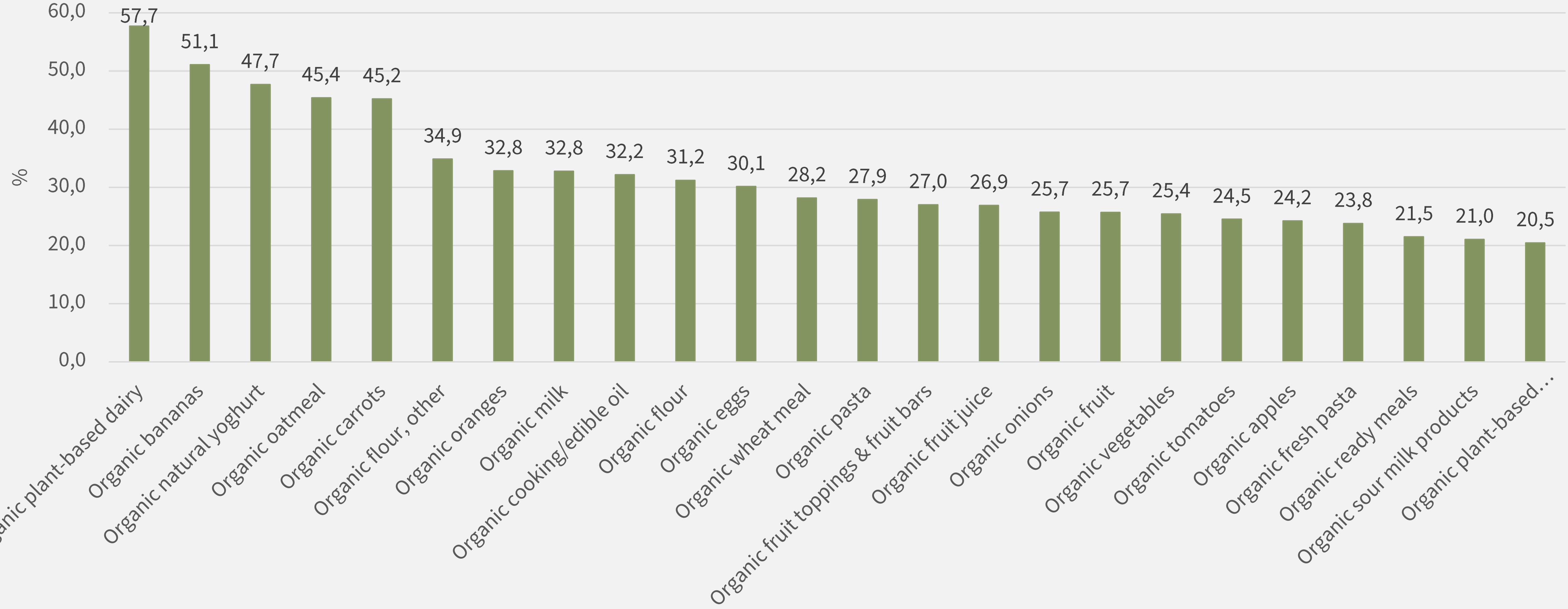


Source: Statistics Denmark.
2020 and 2021 are based on estimates from Organic Denmark

EXAMPLES FROM CATEGORIES AND PRODUCTS WITH AN ORGANIC MARKET SHARE OF +20%

The first examples are found in the large basic product categories. We characterise them as ‘green’ categories because they have an organic market share of over 20%.

ORGANIC MARKET SHARES OF PRODUCT CATEGORIES WITH A MARKET SHARE OF +20%



Source: GfK

PLANT-BASED DAIRY

- organic market share of 57.7%

Organic plant-based beverages are the largest organic category in terms of market share. It is also one of the categories that has seen a huge increase in sales in recent years due to rising consumer demand for vegan products. The example is based on a soya beverage, but the same structure is found in rice, almond and oat beverages. Further value can also be added by considering whether the commodity is grown in Europe or overseas.

The examples used here show that there are only two price levels, as there is little difference between the 'good' and 'better' positions. The primary reason for this is that the 'better' position must actually match the milk products in the refrigerated display cases to be competitive.

Good

Føtex
Private label
DKK 14.95

Good

Nemlig.com
Brand (refrigerated)
DKK 15.95

Better

Føtex
Brand
DKK 21.95

NATURAL YOGHURT

- organic market share of 45.4%

There are two value positions in natural yoghurt, a good and a better, both consisting of brands. One of the distinguishing features of the better position is the focus on certifications from the FSC Label and Animal Protection Denmark.

Some chains with multiple brands divide up the flavour variants to avoid duplicates.

Good

Føtex
Brand
1 litre – DKK 11.75

Better

Føtex
Brand
1 litre – DKK 19.95

OATMEAL

- organic market share of 45.4%

Oatmeal is the Danes’ preferred basic breakfast product, and the product has constituted the largest organic market share for a large number of years. Despite being a single basic product, there is still room for three value positions in most chains, and even the discount chains have room for at least two positions. In addition, some chains even have room for up to as many as four value positions, as there is also a premium variant in this product category.

Private labels are generally very well placed in both the good and better positions within this category, whereas the best position is typically occupied by a brand. In turn, there is a doubling of the price from the good position to the best position.

Good

Meny
Private label
1 kg – DKK 10.95

Better

Meny
Private label
1 kg – DKK 16.95

Best

Meny
Brand
1 kg – DKK 21.95

FROM OATMEAL TO MUESLI AND PORRIDGE

Despite oatmeal being a basic product, it is also a product group that has seen a large product development. Through product processing, oatmeal has moved from being a basic product to now being included in muesli, granola and porridge. Within each of these categories, there are again several different variants and value positions.

It is thus a good example of how a product group can be developed through product processing.

Meny
Private label
1 kg – DKK 10.95

Føtex
Brand – 9 variants
From 530 g to 750 g = price from DKK 27.95 – DKK 39.95

Føtex
Private label
55 g – DKK 10.00

PORRIDGE

Porridge has again become popular, and the porridge concept itself has been developed significantly with different ingredients and toppings, so that it now also comprises convenience variants and instant to-go porridge.

Therefore, there is also room for three value positions, where good and better are a private label, and best is a brand.

Good

Føtex
Private label
55 g – DKK 10.00

Better

Irma
Private label
600 g, DKK 50.00

Best

Irma
Brand
75 g, DKK 26.50

CARROTS

- organic market share of 45.2%

Carrots are a perfect example of good, better, best. Here, you can get a kilo of private label carrots for DKK 10. The better position is characterised by the carrots having undergone a sorting process so that they are more even and identical, and they have also been washed extra carefully. Finally, the best position stands out by being the seasonal variant where the product has retained its top, signalling freshness.

By working with different parameters, the price can be more than doubled. Carrots are a good example of how you can move between the good, better and best positions with the same product by focusing on use and season.

Good

Netto
Private label – Danish
1 kg – DKK 10.00

Better

SuperBrugsen
Brand – Danish
800 g – DKK 20.00

Best

SuperBrugsen
Private label – season
600 g – DKK 18.00

FROM SNACK CARROTS TO CONVENIENCE

Carrots are an excellent example of how a basic product can be developed, including by focusing on consumer convenience, thus making it possible to charge up to eight times more in price in relation to the baseline price of DKK 10.

The same development is also seen in the ‘frozen vegetables’ category.

Netto
Snack carrots
Private label – Danish
500 g – DKK 10.00

Netto
Private label
DKK 25.00

SuperBrugsen
Brand
1 kg – DKK 35.00

SuperBrugsen
Private label
125 g – DKK 10.00

SPECIAL FLOUR – ØLANDSMEL FLOUR AS EXAMPLE

- organic market share of 32.2%

Bread is a staple of the Danes' everyday diet. However, there has traditionally been very limited supply of organic bread for consumers, which has meant that organic bread consumers are seriously into home baking. This has been one of the motivational factors for both producers and chains to have a large range of flour, and the degree of innovation in this product group is therefore also large.

Especially the mills have helped drive the development by launching specialty flour of different cereals. Ølandsmel flour is an example of how work has been done with flavour, an old cereal, different milling degree, rolled or stone milling and location. There is still room for development of this product group by working with staging. This product group is dominated by brands.

Good

SuperBrugsen
Brand
1 kg – DKK 26.95

Better

Meny
Brand
1 kg – DKK 29.95

Better

Meny
Brand
900 g – DKK 29.95
(Kg/price approx. DKK 32.95)

Best

Meny
1.5 kg – DKK 54.95
(Kg/price approx. DKK 36.63)

MILK

- organic market share of 32.8%

Milk is also one of the drivers of organics, and despite being a basic product, there is room for more value positions. Private labels occupy the good position and brands occupy the better and best positions.

Milk is a category where sustainability elements such as animal welfare and climate form part of the work to create room for more value positions. In the example, as many as two variants have been established in both the better and best positions by adding extra value to milk, which precisely taps into conscious consumers' needs.

Good

SuperBrugsen
Private label
DKK 9.95

Better

Kvickly
Brand
DKK 12.50

Better

SuperBrugsen
Brand
DKK 12.95

Best

Kvickly
Brand
DKK 16.00

Best

Irma
Brand
DKK 16.00

COOKING OIL – olive oil as example

- organic market share of 32.2%

Cooking oil is an example of how private labels occupy large parts of all value positions. There is a big price difference in the range from good to best variants, and there may also be big differences in how the oil tastes. When consumers are to select a cooking oil from the shelf, however, only few of them consider taste as a factor. Instead, they choose the oil based on, for example, country of origin preferences.

Another interesting aspect of this category is that, in parallel with this example, there are also more value positions in cooking oil within brands. This is consequently a category with a very large supply of products.

Good

SuperBrugsen
Private label
500 ml – DKK 34.95

Better

SuperBrugsen
Private label
500 ml – DKK 69.95

Best

SuperBrugsen
Private label
500 ml – DKK 139.95

A journey of Southern Europe

Greece – Spain – Italy
DKK 59.95 – DKK 61.50 – DKK 69.95

WHEAT FLOUR

- organic market share of 28.2%

Flour is a traditional large organic product category, one reason being that organic consumers have been used to baking their own bread. This trend was further strengthened during the coronavirus lockdown in spring 2020, which was also reflected in the sales figures for flour.

The good position is here occupied by private labels, and the better and best positions are occupied by brands. There is also significant price difference from the better position to best position.
This example concerns ordinary wheat flour, but the category is particularly interesting, as different cereals, milling methods and local origins have been used in the work with this category over a large number of years.

SuperBrugsen
Private label
1 kg – DKK 11.95

Good

SuperBrugsen
Private label
2 kg – DKK 18.95

Better

SuperBrugsen
Brand
2 kg – DKK 34.95

Best

SuperBrugsen
Brand
1 kg – DKK 25.95

Best

SuperBrugsen
Brand
650 g – DKK 27.95

EGGS

- organic market share of 30.1%

For a basic product like eggs, there is also room for three value positions. The classic private label version holds the good position, and brands hold the better and best positions, where the best position is distinguished by being a local small producer to which storytelling is linked.

Again, it is thus clear to see how a producer can increase the value of its product through storytelling.

Good

Føtex
Private label
10 eggs – DKK 27.95
(Unit price DKK 2.8)

Better

Føtex
Brand
8 eggs – DKK 25.00
(Unit price DKK 3.2)

Best

Føtex
Brand
10 eggs – DKK 34.95
(Unit price DKK 3.5)

PASTA

- organic market share of 27.9%

In a basic category like pasta, there is typically room for 3-4 value positions where private labels occupy the good position, while brands occupy the better and best positions.

The following examples also show how differently the chains price products within the same product group, as the best position costs four times more than the good position.

Good

SuperBrugsen
Private label
500 g – DKK 7.50

Better

Bilka
Brand
400 g – DKK 18.95

Best

Meny
Brand
500 g – DKK 29.95

PASTA

- is not just pasta

Pasta is not just pasta in the traditional sense. Pasta is a category in which the development of fibre-rich, gluten-free or vegan products has made itself felt.

The development is driven by brands, which increasingly work with different types of cereals such as rye, gluten-free variants with corn flour and rice flour as well as vegetable proteins such as lentils, rice and beans.

SuperBrugsen
Brand
500 g – DKK 29.95

SuperBrugsen
Brand
Gluten-free
500 g – DKK 29.95

SuperBrugsen
Brand
Gluten-free
250 g – DKK 33.95

SuperBrugsen
Brand
Gluten-free
250 g – DKK 35.95

FRUIT BARS AND SNACKS

- organic market share of 27.0%

This product group is very much a study in how to make a product group grow rather than a study in value positions. The product group has developed from the classic variant (fig topping) over fruit bars to now being an alternative to sweets.

Through this product development, the producers manage to incorporate different consumption situations in the product, enabling them to reach a higher price point.

SuperBrugsen
The classic – toppings
Brand – DKK 17.95

SuperBrugsen
Bars
Private label – DKK 15.95

SuperBrugsen
Bars
Brand – DKK 17.95

SuperBrugsen
Figure-shaped bars
Brand – DKK 19.95

SuperBrugsen
'marshmellows/bites'
Brand – DKK 12.95

SuperBrugsen
'marshmellows/bites' in small bags
Private label – DKK 19.95

FRUIT JUICE

- organic market share of 26.9%

In the fruit juice product group, private labels occupy the good position, while the better and best positions are held by brands. The below examples also show that the juice producers are beginning to play with the shape of the bottles to differentiate themselves from their competitors by achieving a more unique look.

In addition, the producers are also trying to stand out by distinguishing between juice and lemonade, despite all three examples having the same mixing ratio.

Good

Føtex
Private label
0.5 l – DKK 16.95

Better

Føtex
Brand
0.5 l – DKK 25.95

Best

Føtex
Brand
0.5 l – DKK 32.95

VEGETABLES – BEETROOTS

- organic market share of 25.4% (vegetables)

The conventional beetroot has been regarded as a ‘dying’ vegetable, but organic producers and consumers have managed to give impetus to the product development of the beetroot, making it more accessible to many consumers.

The example shows that by simply switching from a private label to a brand, you can charge DKK 2 more for the same product, probably because it adds more credibility to a product when you can see the producer behind it.

There has generally been a huge development in the convenience segment of fruit and vegetables, and beetroots are no exception to this trend. Convenience is about product processing so that new target groups can be reached, and the below examples show that both whole pre-boiled beetroots and grated beetroots are available. The product processing is also of great importance to the price per kilo. Finally, by producing grated beetroots, you can achieve a win-win situation, as this meets both organic and conventional consumers’ need for convenience, while enabling the producer to use its substandard beetroots.

SuperBrugsen
Private label
1 kg – DKK 13.00

SuperBrugsen
Brand
1 kg – DKK 15.00

SuperBrugsen
Private label – boiled
500 g – DKK 11.00

SuperBrugsen
Brand – grated
300 g – DKK 20.00

MUSHROOMS

- organic market share of 25.4%

Today, mushrooms are much more than just white mushrooms, and there is now much focus on varieties, convenience solutions (e.g. sliced) and packaging solutions which contribute to the development of the mushroom category.

The example below shows that good, better, best are also applicable to packaging solutions. For example, the good position is characterised by the foreign mushrooms being available in plastic packaging, whereas the better position consists of local mushrooms available in cardboard packaging. Plastic is currently looked down on as packaging type by consumers, while cardboard is perceived as more sustainable. Finally, there is a sliced variant, which results in an increase in the product price per kilo.

Good

Meny
Private label
400 g DKK 30.00

Good

Meny
Private label
400 g – DKK 35.00

Better

Meny
Private label
200 g – DKK 24.00

Better

Meny
Private label
200 g – DKK 24.00

Meny
Private label
100 g – DKK 14

VEGETABLES – MUSHROOMS, SUNDRY

The mushroom category has seen a major development from the conventional white mushroom to, among other products, shiitake mushrooms, king trumpet mushrooms and enoki mushrooms as well as dried mushrooms. For the latter category, the price per kilo increases considerably.

The category is distinguished by the focus being on taste, varieties, packaging and degree of processing of the products, to make it easy and inspiring for both consumers and stores.

This is a category from which many producers can obtain inspiration to create development in other categories.

Meny
Private label
250 g – DKK 30

Meny
Private label
100 g – DKK 40

Meny
Private label
100 g – DKK 40

Meny
Private label
100 g – DKK 40

Kvickly
Private label
20 g – DKK 30.00

Kvickly
Private label
30 g – DKK 30.00

ORGANIC VEGETABLES, NEW PRODUCTS

Organic fruit and vegetables account for the largest share of organic sales with 34%. One reason for this is that the absence of pesticides is a major motivation for buying organic products.

The large market share also means that there is room for lots of new products, and the trend is that more retail chains are now beginning to make an active choice only to stock organic variants for certain types of fruit and vegetables.

Below, a selection is presented of the latest variants in fruit and vegetables in 2020, where also organic seedlings have reached the general market.

Meny
Brand
DKK 75.00

SuperBrugsen
Black garlic
DKK 35

SuperBrugsen
White asparagus
DKK 32.00

SuperBrugsen
Jalapeno
DKK 10.00

SuperBrugsen
Lemongrass
DKK 14.00

SuperBrugsen
Private label
50 g – DKK 18.00

SuperBrugsen
Salsify roots
DKK 20.00

TOMATOES

- organic market share of 24.5%

Tomatoes are an example of a product group in which there is much focus on varieties and thus taste. It is also a product group dominated by private labels and partly co-branding.

The value positions depend on both the packaging solution and whether the product is imported. However, it can be difficult for the individual consumer to understand what is what.

Good

Irma
Private label
400 g – DKK 15.00

Better

Irma
Private label
450 g – DKK 29.00

Irma
Private label
250 g – DKK 15.00

Irma
Private label
250 g – DKK 27.00

Irma
Private label
200 g – DKK 24.00

Irma
Private label
200 g – DKK 25.00

APPLES

- organic market share of 24.2%

The supply of apples varies according to the season.

Apples are a product group dominated by private labels, and there is often merely a distinction between red and green apples. There should consequently be a great potential in working with early and late varieties, taste, use (cooking apples vs. eating apples) and location.

Good

Netto
Private label
1 kg – DKK 15.00

Better

Netto
Private label
1 kg – DKK 22.00

Best

Netto
Private label
6 apples – DKK 25.00

APPLES

- organic market share of 24.2%

There is good inspiration to be obtained from fruit and vegetable departments in German supermarkets and how they work with different varieties.

Alnatura – fruit and vegetables

BioCompany – apple overview

FRESH PASTA

- organic market share of 23.8%

Below, spinach pasta has been used as an example, but the same applies to regular pasta.

Fresh pasta is dominated by two classic value positions, where a private label holds the good position and a brand occupies the better position.

Good

Føtex
Private label
250 g – DKK 9.95

Better

Føtex
Brand – two variants
250 g – DKK 16.95

READY MEALS, EXAMPLE WITH DAHL

- organic market share of 21.5%

Organic ready meals are a category that is undergoing great development due to increasing consumer demand for convenience food. The development is therefore not only seen in vegetarian ready meals. It is a general trend that is making itself felt in many types of ready meals.

The below examples with Dahl show that all the value positions are occupied by brands, which can be explained by the fact that this is still a relatively young category in which private labels have yet to make their entry.

It is also interesting to see that a distinguishing feature of the best variant is the packaging, which is here recyclable glass.

Good

Føtex
Brand (Hanegal)
400 g – DKK 39.95

Better

Irma
Brand
400 g – DKK 50.00

Better

Føtex
Brand (Løgismose)
350 g – DKK 44.95

Best

Føtex
Brand (vegan)
750 g – DKK 99.00

READY MEALS, EXAMPLE WITH SOUPS

- organic market share of 21.5%

In the category of chilled soups, there are also good and better value positions. As with other ready meals, this is a young category that is seeing growth and where there are many possibilities for flavour variants.

There is also variation in both packaging types and portion sizes. Frozen soups are now also available in this range in many chains.

Good

Lidl
Brand
300 ml – DKK 19.75

Good

Irma
Brand
450 g – DKK 32.00

Better

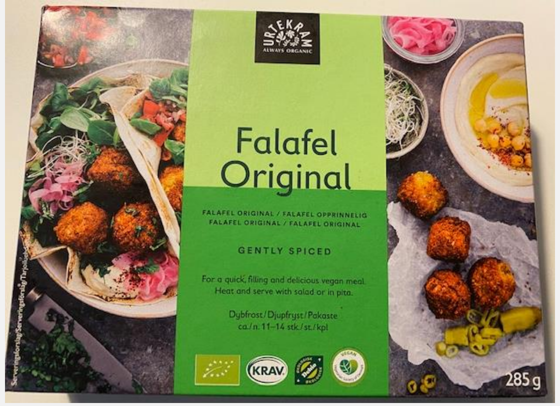
Irma
Brand
580 g – DKK 59.95

PLANT-BASED MEAT/FISH/POULTRY/COLD CUTS

- organic market share of 20.5%

The organic plant-based category is a young category for which there are great expectations for an even stronger development in the coming years. One reason for this is consumers' increasing focus on and awareness of sustainability, in which organics play a natural role.

Analyses from the Vegetarian Society of Denmark – DVF (2019) show that vegetarian consumers prefer plant-based products to be organic.



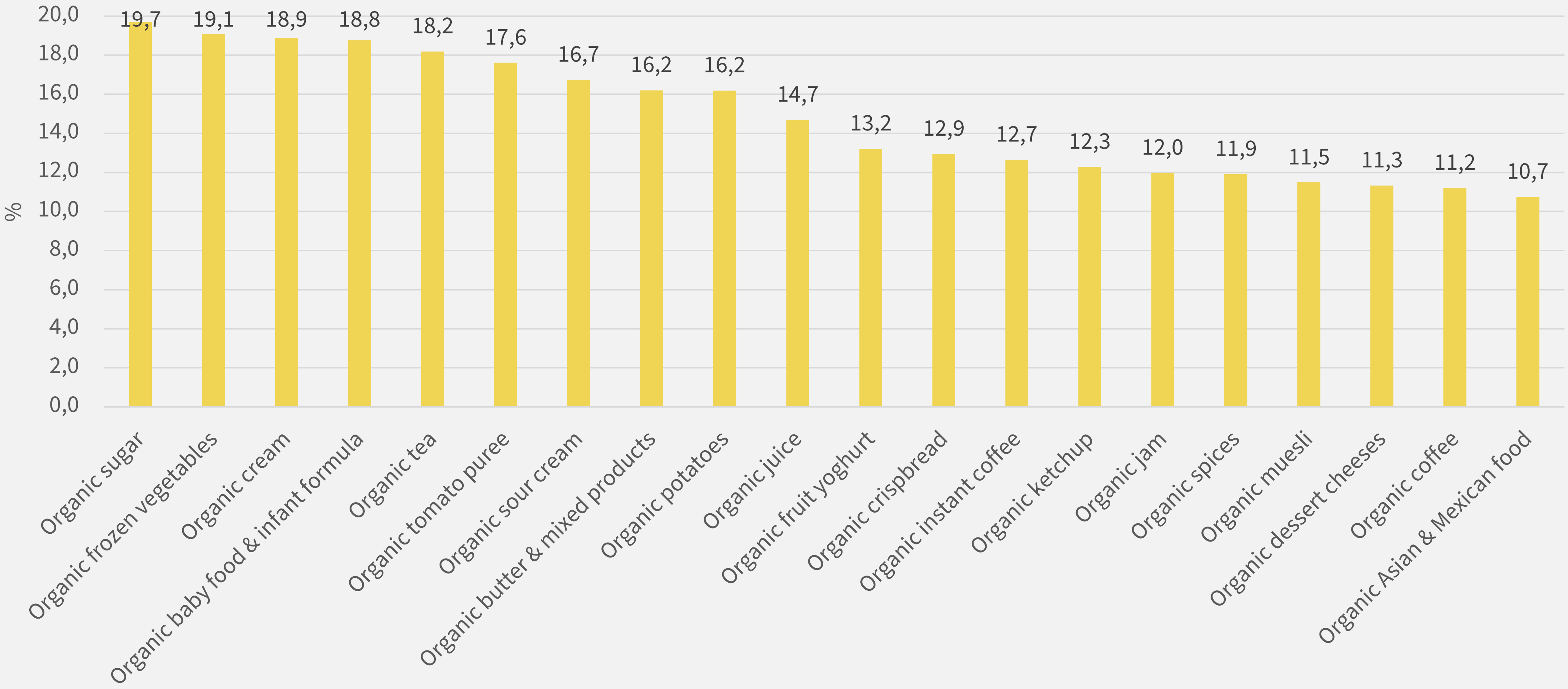
Kvickly
Brand
285 g – DKK 26.95

Irma
Brand
200 g – DKK 39.00

EXAMPLES FROM CATEGORIES AND PRODUCTS WITH AN ORGANIC MARKET SHARE BETWEEN 10%-20%

We characterise the next examples as ‘yellow’ categories because they have an organic market share between 10%-20%.

ORGANIC MARKET SHARES OF PRODUCT CATEGORIES WITH A MARKET SHARE BETWEEN 10%-20%



Source: GfK

SUGAR

- organic market share of 19.7%

For many years, organic sugar was primarily cane sugar, but, in recent years, most chains have added beet sugar, which also makes sense in relation to sustainability, as the commodity can be produced locally. Once again, the good position is occupied by a private label, whereas better and best are held by brands. It is a product with a very large price difference between the good and best positions

Good

Føtex
Private label
1 kg – DKK 14.95

Better

Føtex
Brand
1 kg – DKK 22.50

Best

Føtex
Brand
500 g – DKK 24.95

FROZEN VEGETABLES

- organic market share of 19.1%

This category is seeing a great development, and organic products are taking up more and more space in the frozen food display cases, which have otherwise traditionally been dominated by conventional frozen vegetables. In the organic frozen vegetables range, the consumer can find both well-known classic vegetable and root vegetable mixes, but new variants such as cauliflower and broccoli rice also take up space.

Variants that support consumer demand for healthy products and ‘semi’-convenience. These are variants that make it easy for consumers, and they also allow producers to use substandard vegetables. In addition, there has also been an upgrade from fresh root vegetables to frozen substandard root vegetables, which provides the producer with better opportunities to exploit all its root vegetables. The category is thus seeing a lot of product development, and Irma also stocks, for example, beetroot.

Netto
Private label
450 g – DKK 10.00

Netto
Private label
450 g – DKK 12.95

SuperBrugsen
Private label
350 g – DKK 13.95

Meny
Private label
350 g – DKK 15.95

BABY FOOD AND INFANT FORMULA

- organic market share of 18.8%

The baby food category is dominated by brands. The reason may be that consumers feel more secure if it is clear who the producer is. This is of particularly great importance when it comes to products for babies and children.

Both for fruit mash or powder, there are only two value positions: a slightly lower-priced alternative and a more expensive alternative. There are several small baby food producers on the market, but their products are only sold via webshops or in individual stores.

Good

Meny
Brand
190 g – DKK 17.95

Better

Irma
Brand
150 g – DKK 19.00

Good

Kvickly
Private label
200 g – DKK 27.95

Better

Kvickly
Brand
150 g, DKK 34.50

TEA

- organic market share of 18.2%

The tea category is still dominated by brands, consisting of the old traditional players (Tørsleff and Fredsted), the arch ecologists (Yogi and Pukka) and, finally, also new players which differentiate themselves on new parameters. For example YoYo, which produces maté tea, which is a South American phenomenon that has now arrived in Europe and is characterised by a high content of caffeine. Tea is thus moving into the energy drinks segment.

Within the tea category, there are more value positions due to the wide range and varying price points. In addition, lifestyle elements are increasingly being included in the products, which also adds extra value.

SuperBrugsen
Brand
DKK 12.95

SuperBrugsen
Brand
DKK 18.50

SuperBrugsen
Brand
DKK 29.95

SuperBrugsen
Brand
DKK 39.95

SuperBrugsen
Brand
DKK 49.95

TOMATO PUREE AND CHOPPED TOMATOES

- organic market share of 17.6%

Here the organic variant is the lowest priced product in the form of a private label, after which there is a jump up to the tetrapak variant, where the price is nearly twice as high. Brands can charge 2.5 and 3 times, respectively, as much for the same quantity. There is consequently room for more price points, which has clearly been exploited for chopped tomatoes.

In this category, there is also focus on using different packaging types, but there is currently no clear trend as to whether the market is moving towards tetrapak or aluminium tins.

Good

Føtex
Private label
400 g – DKK 4.25

Better

Føtex
Private label
390 g – DKK 8.95

Best

Føtex
Brand
400 g – DKK 10.95

Best

Føtex
Brand
400 g – DKK 12.95

PASSATA

Organic passata typically consists of three value positions where private labels occupy the good position and brands occupy the better and best positions. The interesting aspect is that the three products in the three positions are not clearly distinguishable from each other, either in terms of quantity or bottle design. However, it is still possible to position the best variant (for example via an Italian text) at a price that is twice as high as for the good position.

In the long term, it will be obvious to focus either on the packaging or on more specific storytelling to differentiate the products from each other and thus achieve a clearer value position.

Good

Føtex
Private label
700 ml – DKK 14.95

Better

Føtex
Brand
700 ml – DKK 19.95

Best

Føtex
Brand
700 ml – DKK 30.95

BUTTER AND MIXED PRODUCTS

- organic market share of 16.2%

Despite the fact that we have had a fat-scared generation in the 90s and 00s, sales of butter are increasing, which is reflected in the wide range. In ordinary butter alone, there is room for three value positions, all occupied by brands. Private labels have not yet made a decisive market entry here.

In addition to ordinary butter, there are variants such as lactose-free, unsalted and vegan.

Good

Føtex
Brand
200 g – DKK 19.95

Better

Føtex
Brand
200 g – DKK 22.95

Best

Føtex
Brand
200 g – DKK 29.95

Føtex
Brand – vegan
200 g – DKK 16.95

Føtex
Brand – lactose-free
200 g – DKK 29.95

Føtex
Brand – unsalted
200 g – DKK 29.95

POTATOES

- organic market share of 16.2%

In many chains, organic potatoes are dominated by a private label in the good position and by a brand in the better position.

Potatoes are greatly differentiated by being sorted into large and small potatoes, where especially Danish small potatoes can obtain a higher price. Small potatoes are generally taking over the market as they meet consumers' need for convenience.

It may seem surprising that more experiments are not being conducted with different varieties, as, precisely in the potatoes category, there are a very large number of different varieties with different tastes and uses. In addition, potatoes are also available in different colours, and additional variants may also be imagined in convenience solutions such as peeled, pre-boiled, wedge-cut etc.

SuperBrugsen – New potatoes
Egypt
Private label
500 g – DKK 15.00

SuperBrugsen
Potatoes for mash – Denmark
Private label
1 kg – DKK 14.00

SuperBrugsen
Potatoes – Denmark
Private label
1 kg – DKK 10.00

SuperBrugsen
Baking potatoes – Denmark
Private label
900 g – DKK 20.00

SuperBrugsen
Potatoes
Brand
1 kg – DKK 17.00

Irma
New potatoes
Brand
500 g – DKK 22.00

JUICE

- organic market share of 14.7%

Examples of both juice and cider are given below. There are not many value positions for cider, but there are luxury cider types, most of which, however, are sold in farm shops and via webshops.
There has been a development in juice in recent years, where cold-pressed juice has gained ground in line with the interest in juice shots having increased. With the cold-pressed juices, this is almost a product group with a good position and a best position.

Good

SuperBrugsen
Private label – 1 l
DKK 8.95

Better

SuperBrugsen
Brand
0.85 l – DKK 22.00

Best

Føtex
Brand cold-pressed
250 ml – DKK 14.95

Good

SuperBrugsen
Private label cider
0.75 l – DKK 23.95

Better

Meny
Brand cider
0.75 l – DKK 24.95

SHOTS

Ginger shots have become highly popular in recent years, as it fits perfectly into the existing health trend. Therefore, it is also a product group in which experiments are being conducted with taste and packaging, and where there are consequently more value positions. The price level depends greatly on the mixing ratio in the individual shot.

Shots are available in all sizes as well as chilled and as grocery product.

Good

Lidl
Brand
150 ml – DKK 9.95

Better

Føtex
Private Label
60 ml – DKK 9.95

Good

SuperBrugsen
Brand
300 ml – DKK 34.95

Better

Irma
Brand
500 ml – DKK 55.00

Best

SuperBrugsen
Brand
250 ml – DKK 37.95

FRUIT YOGHURT

- organic market share of 12.9%

There are two value positions in fruit yoghurt, a good and a better, both of which consist of brands. One of the distinguishing features of the best position is a focus on certifications from the FSC Label and Animal Protection Denmark.

Some chains with multiple brands divide up the flavour variants to avoid duplicates.

Good

Føtex
Brand
1 litre – DKK 15.95

Better

Føtex
Brand
1 litre – DKK 19.95

CRISPBREAD

- organic market share of 12.9%

Traditionally, the crispbread category has been characterised by a small and uniform supply, dominated by the Wasa brand. It was one of the first product types for which the development of more value positions took off. Today, this is a product group with much product development and a wide range. The journey started with the development of gourmet crispbread, which has generally given a quality boost to the product type. There are also gluten-free crispbread variants. Finally, this is a product group dominated by private labels.

Netto
Private label
225 g – DKK 12.95

Netto
Private label
220 g – DKK 16.95

Netto
Private label
150 g – DKK 13.95

Netto
Private label
190 g – DKK 26.95

Netto
Private label
140 g – DKK 25.00

CRISPBREAD

- organic market share of 12.9%

Today, even a discount store will stock many different types of crispbread. The wide range available on the shelves also documents large sales, and there is consequently room for 2-3 value positions.

Lidl
Private label
DKK 16.50

Lidl
Brand
DKK 18.65

Lidl
Private label
DKK 21.95

INSTANT COFFEE

- organic market share of 12.7%

Also within instant coffee, organics have gained a foothold with more value positions. Again, the good position is occupied by a private label.

It is interesting to note that the price difference between the private label variant and the most expensive brand is that the latter costs more than twice as much.

Good

Føtex
Private label
100 g – DKK 29.95

Better

Føtex
Brand
100 g – DKK 56.90

Best

Føtex
Brand
100 g – DKK 66.90

INSTANT COFFEE – COFFEE CAPSULES

- organic market share of 12.7%

The Danes have long demanded good specialty coffee at home and not just when visiting cafés. Therefore, it is now possible to find coffee capsules in different value positions even in discount stores. This underlines that coffee capsules are a new ‘trendy category’ that is growing and demands its place on the shelves for both brands and private labels. A favourable characteristic feature of the best position is that the producer taps into the sustainability agenda by the capsules being degradable.

Good

Netto
Private label
DKK 20.00

Better

Netto
Brand – two variants
DKK 25.00

Best

Netto
Brand – two variants
DKK 29.95

KETCHUP

- organic market share of 12.3%

Ketchup is a staple in many homes, and many have a favourite brand from which they hardly ever deviate. This also applies to organic ketchup, with the price difference being that a private label in the good position only costs approximately 1/3 of what the branded variant costs.

Good

Føtex
Private label
470 g – DKK 11.95

Better

Føtex
Brand
500 ml – DKK 30.95

Best

Føtex
Brand
500 ml – DKK 35.25

JAM – strawberry as example

- organic market share of 12.0%

There are also several price points and value positions for jam. A private label holds the good position and a brand holds the better and best positions. The latter stands out by bringing the berry variety into play and displaying it on the front label to signal that they are using a special berry with a special flavour and/or have added an extra twist by spicing it up with rose pepper in the example.

The category also makes it possible to work with varieties, spices, flavours, packaging, storytelling etc.

Good

Kvickly
Private label
340 g – DKK 15.40

Better

Kvickly
Brand
280 g – DKK 24.95

Best

Kvickly
Brand
280 g – DKK 29.95

SPICES – oregano as example

- organic market share of 11.9%

When looking at dried spices, it is important to keep an eye on the kilo price, as the size of the packaging can quickly give a false impression of the actual quantity. There are several value positions in spices where private labels hold the good and better positions and brands hold the best position.

Organic spices are a rapidly developing product group. This applies to basic spices, mixed spices and more niche-characterised spices.

Good

Irma
Private label
60 g – DKK 29.95

Better

SuperBrugsen
Private label
10 g – DKK 19.95

Best

Føtex
Brand
16 g – DKK 44.95

Best

SuperBrugsen
Brand
6 g – DKK 21.95

SuperBrugsen
Brand – mixture
45 g – DKK 28.95

MUESLI

- organic market share of 11.5%

The supply of organic muesli variants is huge. There is a big difference in the mixing ratio between the basic ingredient, which is often oatmeal, and the added ingredients such as dried fruit, grain, seeds and nuts.

The good and better positions are often occupied by private labels, but there is no rule without exception.

Good

Netto
Private label
750 g – DKK 13.95

Better

Netto
Private label
600 g – DKK 14.95

Best

Netto
Brand
500 g – DKK 39.00

SPECIAL AND DESSERT CHEESES

- organic market share of 11.3%

In the same way as for firm cheese and sliceable cheese, there has also been a huge development in speciality cheeses, and today you can therefore generally get your favourite speciality cheese in an organic variant. There is typically a strong connection between the individual chain and the dairy/wholesaler, which is why each chain has its own range of speciality cheeses.

There are no significant value positions as the price depends on the type of cheese. The cheese market is generally still dominated by brands, but private labels have started to capture market shares.

Føtex
Private label
200 g – DKK 24.95

Føtex
Brand
200 g – DKK 37.00

Lidl
Brand
102 g – DKK 19.64

Føtex
Brand
200 g – DKK 42.95

COFFEE – WHOLE BEANS

- organic market share of 11.2%

In coffee – here exemplified by whole beans – there are a large number of opportunities for establishing your own unique position by differentiating the product either by country of origin, variety, roasting level, blend of beans, certifications etc. Like olive oil, for example, coffee can challenge consumers to go on different flavour journeys.

The coffee category is dominated by brands, but private labels are also available for individual variants.

Good

SuperBrugsen
Brand
400 g – DKK 36.95

Better

SuperBrugsen
Brand
400 g – DKK 49.95

Best

Føtex
Brand
340 g – DKK 51.95

COFFEE – JOURNEY TO THE WORLD'S COFFEE COUNTRIES

- organic market share of 11.2%

SuperBrugsen
Brand
400 g – DKK 36.95

SuperBrugsen
Brand
350 g – DKK 40.00

ASIAN AND MEXICAN FOOD

- organic market share of 10.7%

In this category, there are most often only two value positions where the good position is dominated by private labels and the better position by brands.

Good

SuperBrugsen
Private label
240 g – DKK 15.95

Better

Bilka
Brand
320 g, DKK 27.00

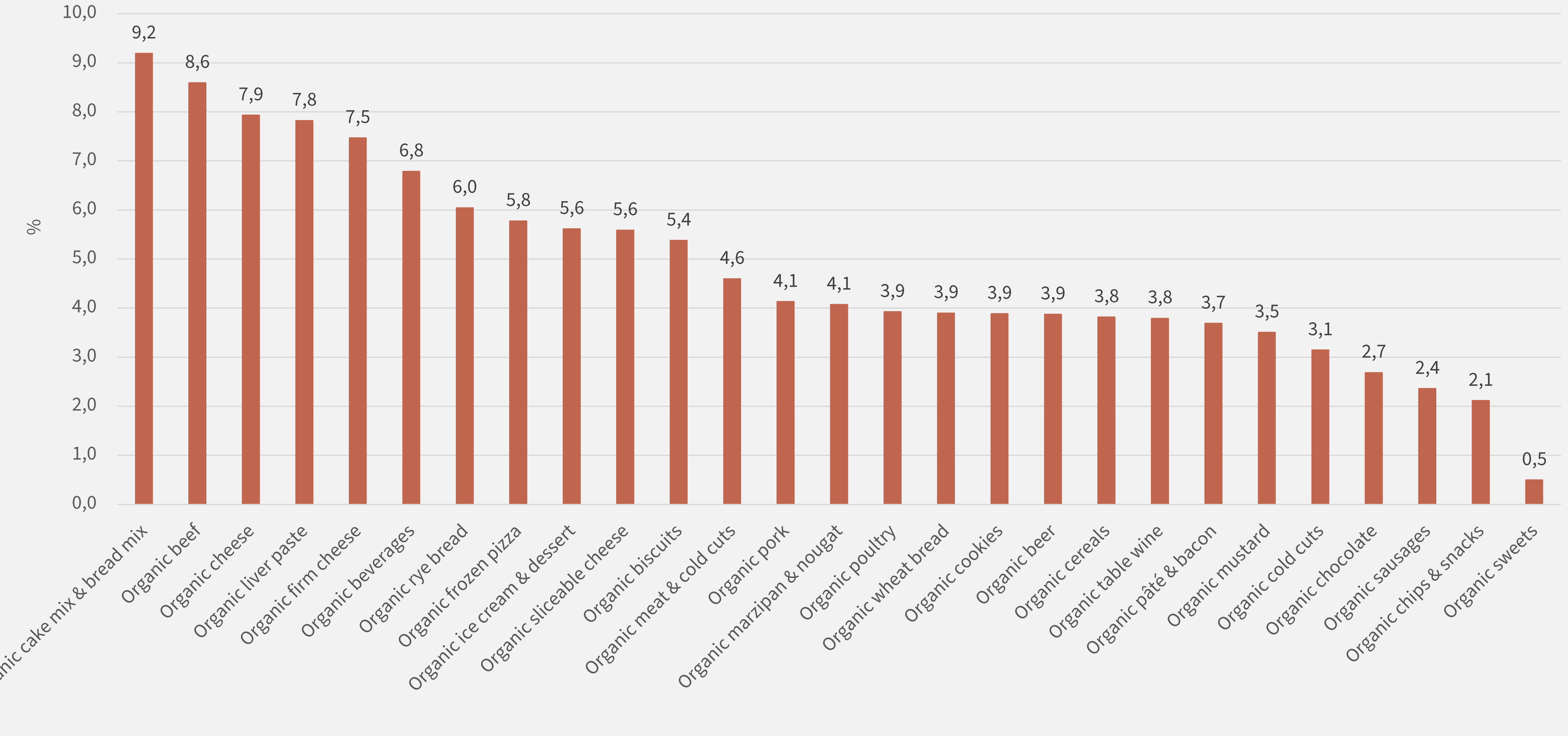
EXAMPLES FROM CATEGORIES AND PRODUCTS WITH AN ORGANIC MARKET SHARE BELOW 10%

In the following, we show examples from the product groups that have an organic market share below 10%.

The examples show that even the product groups with a low organic market share are seeing a large development.

This is thus not just about value positions. The following examples also reflect that we are now using the entire organic staircase and that work is being done in all categories.

ORGANIC MARKET SHARES FOR PRODUCT GROUPS WITH A MARKET SHARE BELOW 10%



BREAD MIXES

- organic market share of 9.2%

Bread and other baking mixes are a growing product group. It fits perfectly into the busy organic consumer's need for an easy and quick solution that is still organic. The convenience solution also appeals to a wider target group than just the super-ecologists.

There are many solutions available on the market, but with big differences between portioning and expected yield. There are brands and private labels in all value positions

Good

Meny
Brand 8-10 buns
550 g – DKK 20.95

Better

Irma
Private Label – 18-20 buns
1 kg – DKK 40.00

MINCED BEEF
- organic market share of 8.6%

Here, a distinction is made between the good position, held by a private label, and the better position, which is typically held by a brand. It is a growing product group, where the focus is also on convenience and local origin, which can add credibility and authenticity to the product.

Good

SuperBrugsen
Private label
8-12%
400 g – DKK 31.75

Better

Irma
Brand
8-12%
400 g – DKK 45

SuperBrugsen
Brand
300 g – DKK 34.95

SuperBrugsen
Brand
360 g – DKK 39.95

LIVER PASTE

- organic market share of 7.8%

Liver paste has traditionally been dominated by brands, but today private labels have also made their entry in the large chains.

There are often two value positions in the stores.

Good

Meny
Brand
DKK 12.95

Good

SuperBrugsen
Private label
DKK 13.95

Better

Meny
Brand
DKK 19.95

FIRM CHEESE – MEDIUM-AGED

Cheese is a category in which it has taken a long time for organics to break through. This is now changing and the product group is developing, which means that organic consumers can now choose their favourite by taste, storage length and fat percentage.

Below, the medium-aged variant has been chosen as an example, but there are plenty of other examples when looking at, for example, ageing and fat percentage. It is important to bear in mind that cheese is much more about personal taste than value positions, even though there are several value positions in the category.

Good

Føtex
Brand – Danbo
45% - 470 g – DKK 42.50

Better

Føtex
Brand – Danbo 45%
500 g, DKK 41.95

Best

Føtex
Brand – Danbo 45%
600 g – DKK 69.95

RYE BREAD

- organic market share of 6.0%

The development of organic variants commenced very late in the rye bread category. More variants have only appeared on the shelves in the past 2-3 years. The products most often available on the shelves in most stores are sliced variants, whereas whole organic rye breads are only found in a few stores in the Greater Copenhagen area.
Rye bread is therefore still a category with great potential for development, as it is a staple in the Danes' diet – both for the packed lunch and dinner. This is a category that clearly lacks a Category Captain.

Good

Irma
Private label
310 g – DKK 8.25

Better

Irma
Brand
725 g – DKK 18.00

Best

Irma
Private label
500 g – DKK 16.50

Irma
Private Label – whole rye bread
- Seed rye bread
800 g – DKK 26.00
- Hedebageren's rye bread
1 kg – DKK 27.00

FROZEN PIZZA

- organic market share of 5.8%

Organic pizza has also found room in the frozen food display cases. There are several taste variants to choose from.

The product group is characterised by private labels unless the consumer prefers gourmet pizza with a sourdough base and local produce.

Good

SuperBrugsen
Private label
DKK 29.95

Best

SuperBrugsen/Meny – selected stores
4-5 variants (depending on season)
DKK 99.00

ICE CREAM

- organic market share of 5.6%

There is a huge selection in organic ice cream, ranging right from completely basic vanilla ice cream to 'Ben and Jerry' ice cream types. The producers work with different types of milk, local ingredients and the history of the ice cream dairy.

Like in other categories, the good position is often occupied by a private label, while the better and best positions are occupied by brands. A small local producer often occupies the best position.

Good

Kvickly
Co-branding
725 ml – DKK 49.95
Price per litre: DKK 68.9

Better

Kvickly
Brand
725 ml – DKK 57.95
Price per litre: DKK 79.83

Better

SuperBrugsen
Brand
450 ml – DKK 39.95
Price per litre: DKK 88.78

Best

Meny
Brand
500 ml – DKK 59.95
Price per litre: DKK 119.9

SLICEABLE CHEESE

- organic market share of 5.6%

Like firm cheese, sliceable cheese has also seen a rapid development, and you can therefore say that there has been a breakthrough for cheese in the organic category, which means that there is a large supply of organic cheeses today.

But cheese is very much about personal taste, making it necessary to have more brands available, so that consumers can choose their favourite brand and flavour. All the packs below are of 200 g, and there are two value positions, held by brands.

Good

Føtex
Brand
200 g – DKK 20.95

Better

Føtex
Brand
DKK 27.95

Better

Føtex
Brand
DKK 29.95

BISCUITS
- organic market share of 5.4%

Biscuits belong under snacking products which can be eaten on-the-go. This is an area that has seen high growth in recent years. There are regular biscuits, coarse variants, muesli biscuits and gluten-free biscuits.

The supply of biscuits is large, and there is a mix of private labels and brands in all value positions.

Good

Bilka
Brand
400 g, DKK 21.95

Better

Irma
Private label
200 g – DKK 32.00

Best

Netto
Private label
140 g – DKK 25.00

PORK

- organic market share of 4.1%

Pork also has several value positions, which are dominated by brands, private labels and co-branding.

However, the different value positions depend more on the fat percentage and whether the product has been processed.

Good

Netto
Private label
8-12%
400 g – DKK 44.95

Better

Kvickly
Brand
8-12%
400 g – DKK 44.95

Irma
Brand
340 g – DKK 41.50

MARZIPAN & NOUGAT

- organic market share of 4.1%

Even in a small and seasonal category like marzipan and nougat, there are now 2-3 value positions. Here, the good and best positions are held by private labels. However, the best position is also characterised by co-branding, while the better position is held by a brand.

This is a good example of how organics have spread from having a solid position in the basic categories to now also having gained a foothold in the pleasure-oriented and niche-characterised product groups.

Good

SuperBrugsen
Private label
200 g – DKK 36.50

Better

Føtex
Brand
200 g – DKK 42.50

Best

Lidl
Brand
200 g – DKK 53.90

Good

SuperBrugsen
Private label
100 g – DKK 39.95

Better

Lidl
Brand
150 g – DKK 53.90

WHEAT BREAD

- organic market share of 3.9%

The wheat bread category is undergoing development, but it is also a category with great potential. For example, there is still not an organic plain white bread, and the selection of buns and other wheat bread also remains very small.

There are virtually no comparable products within the fresh bread range.

Good

SuperBrugsen
Brand
6 units – DKK 18.95

Better

SuperBrugsen
Brand
4 units – DKK 30.95

SuperBrugsen
Brand
6 units – DKK 23.95

SuperBrugsen
Brand
4 units – DKK 26.95

FROZEN BREAD

The organic market share for frozen bread has not yet been calculated separately, but it is an area with an increasing product range and where there are currently at least two value positions.

The range available in the stores differs widely across Denmark and is a mixture of private labels and brands.

Good

SuperBrugsen
Brand
420 g – DKK 18.95

Better

Irma
Brand
500 g – DKK 35.00

Better

SuperBrugsen
Brand
400 g – DKK 31.95

FROZEN UNBAKED BREAD AND DOUGH

Frozen unbaked bread/dough is a brand-new product group. This is currently a very small product group, which is only available in the Greater Copenhagen area, but it has great potential if you look at how much convenience is growing – also in organics.

Meny
Brand
DKK 24.95

Meny
Brand
DKK 32.95

Meny
Brand
DKK 39.95

Meny
Brand
DKK 49.95

COOKIES

- organic market share of 3.9%

The supply of organic cookies in supermarkets is still relatively small, which is also reflected in the organic market share of only 3.9%. However, the value positions have nevertheless started to make themselves felt.

Good

Lidl
Private label
200 g, DKK 16.45

Better

Lidl
Private label
200 g, DKK 27.95

Best

Irma
Private label
150 g, DKK 37.00

BEER

- organic market share of 3.9%

Until three or four years ago, organic beer was dominated by microbreweries and craft beers. The selection of organic craft beers is huge, but the ordinary lager has now also become part of the regular organic range.

There are thus now at least two value positions in, for example, lager – both held by brands

Good

SuperBrugsen
Brand
6x33 cl – DKK 40.50

Better

Meny
Brand
DKK 14.95

WINE

- organic market share of 3.8%

The outer categories have seen a great development, for example in alcoholic beverages, including wine, but also in, for example, gin, where organic consumers can now also join in the trend.

The example below is based on rosé wine, but the situation is the same for white wine and red wine, where there are at least three value positions, all held by brands.

Good

Irma
Brand
750 cl – DKK 79.95

Better

Irma
Brand
750 cl – DKK 120.00

Best

Irma
Brand
750 cl – DKK 149.95

MUSTARD

- organic market share of 3.5%

For organic mustard, there is typically only a private label variant and a brand variant – and typically the Dijon variant.

There is clearly a potential in developing the range with more flavours or other mustard types known from the conventional range.

There are a number of exciting variants on the German market

Good

Føtex
Private label
260 g – DKK 14.95

Better

Føtex
Brand
200 g – DKK
23.95

Denns in Germany
Large selection of
mustard.

COLD CUTS

- organic market share of 3.1%

There is generally not a very large selection of organic sliced cold cuts. Typically, smoked pork loin, rolled sausage and one more variant can be found. However, there is a wider selection of salami, both as sliced variants and whole sausages.

The market is a mix of private labels and brands, where brands often occupy the better position and possibly also the best position.

Good

SuperBrugsen
Brand
70 g – DKK 16.95
DKK 24.21 per kilo

Better

Irma
Brand
60 g, DKK 21.00
DKK 34.99 per kilo

Good

Føtex
PL – mild
DKK 33.95

Better

Føtex
Brand – sdr. jysk
DKK 49.95

CHOCOLATE

- organic market share of 2.7%

Within chocolate, there are several clear value positions, and this applies to light, dark and flavoured variants. There is also extensive use of certifications for sustainability and fair trade.

Until recently, the product group has only been represented by brands, but, here too, private labels have become a regular part of the range.

Good

SuperBrugsen
Private label
100 g – DKK 18.95

Better

SuperBrugsen
Brand
90 g – DKK 28.95

Best

SuperBrugsen
Brand
75 g – DKK 39.95

SAUSAGES

- organic market share of 2.7%

The supply of organic sausages varies widely, but there is a clear difference between the ‘everyday range’ and the ‘barbecue range’. The product category contains everything from the regular Frankfurt sausage to more advanced sausages with inspiration from Southern Europe. There are sausages based on pork, beef and chicken.

It is also an exciting development that fresh, raw sausages are now available on the market. There is a wide range of both private labels and brands in all value positions.

Good

Meny
Brand
240 g – DKK 42.95

Better

SuperBrugsen
Brand
350 g, DKK 49.95

Best

Irma
Private label
280 g – DKK 59.00

CHIPS

- organic market share of 2.1%

Within the chips category, more value positions are also beginning to appear. As in other categories, ‘ordinary variants’ are exchanged for private labels, and brand products are developed with new value parameters such as protein via the use of lentils, maize and peas instead of traditional root vegetables

Good

Kvickly
Private label
175 g, DKK 17.95

Better

Føtex
Brand
125 g, DKK 22.95

Better

Kvickly
Private label
100 g, DKK 19.95

Best

Føtex
Brand
85 g, DKK 23.00

SWEETS

- organic market share of 0.5%

The supply of organic sweets varies widely from chain to chain – sometimes from store to store. There are several variants in marshmellows, wine gums, liquorice and the combination liquorice, nuts and chocolate, while bonbons and drops are harder to find.

There is a classic division of the value positions, with the good position being held by private labels and the better position by brands

Good

SuperBrugsen
Brand
100 g – DKK 14.95

Better

Meny
Brand
100 g – DKK 24.00

EXAMPLES OF NEW PRODUCTS IN GROCERIES

SuperBrugsen
Sourdough
DKK 22.95

SuperBrugsen
Sourdough
DKK 22.95

SuperBrugsen
Essences
25 cl – DKK 176

Føtex
Brand
150 g – DKK 19.95

Meny
Brand
400 g – DKK 14.95

Føtex
Brand
250 g – DKK 18.95

Netto
Private label
250 g – DKK 18.95

Birch&Birch

FÅ FORSPRING I KONKURRENCEN OM FORBRUGEREN

Extract from workshop

Above, we have zoomed in on the value positions in the Danish retail trade. We will now take a step back and look 2-3 years into the future together with market analyst and lifestyle expert Flemming Birch.

We will thus add some overall perspectives to the above presentation in relation to what modern consumers would like to find on the supermarket shelves, as well as what value positions there is room for, where the opportunities are and, finally, how this interacts with private labels.

THE RETAIL TRADE OF THE FUTURE IS ABOUT VALUES

Prices and quality are established factors – so values and ethics become new competitive parameters

As the first chain, Lidl chose to stop the sale of Ross308 – also known as the turbo chicken.

Salling Group boasts about selling less...... tobacco

COOP is waging a war on pesticide residues in food products

Du er her: Coop.dk › Om Coop › Presse › Pressemeddelelser

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COOP GØR OP MED PESTICIDRESTER I FØDEVARER

12. marts 2019

Coop ønsker en fremtid uden pesticidrester i deres varer. Koncernen stiller derfor nu en række nye krav til anvendelsen af pesticider i frisk frugt og grønt. Blandt andet vil Coop sænke de officielle grænseværdier for pesticidrester med 50 procent.

"Nu tager vi et stort skridt mod at komme pesticidrester i danskernes fødevarer til livs. Derfor indfører vi en række ekstra krav til anvendelsen af pesticider i vores friske frugt og grønt, uden at det går ud over pris og kvalitet. Flere af vores leverandører er enige med os i, at brugen af pesticider kan reduceres yderligere, og vi mener, tiden nu er inde til handling," siger Signe Frese, CSR Direktør hos Coop.

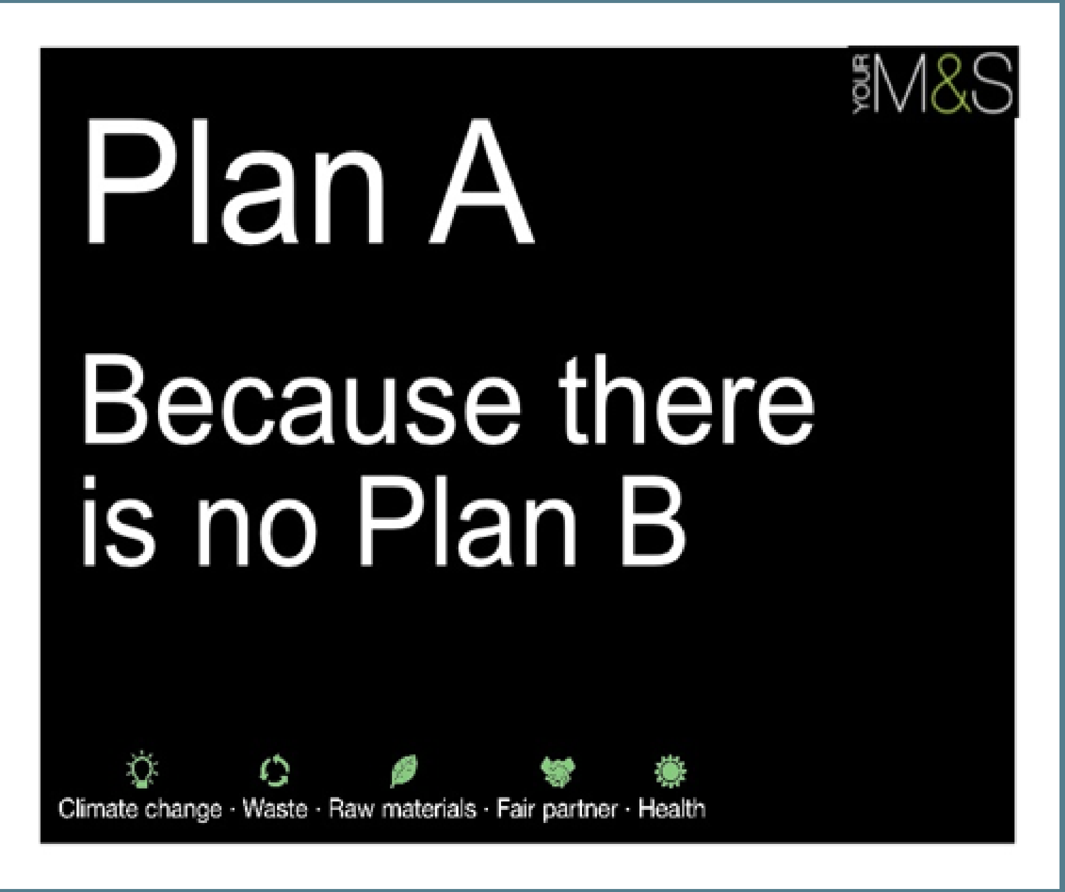
De nye tiltag skal sikre, at flere varer fremover bliver helt fri for pesticidrester, og at de mest problematiske pesticider slet ikke anvendes. Helt konkret indfører Coop bl.a. en grænseværdi for pesticidrester i frugt og grønt på bare halvdelen af, hvad EU og de danske myndigheder i dag tillader. Det betyder, at Coop i sidste ende vil afbryde samarbejdet med de leverandører, der ikke lever op til Coops nye standarder.

Ifølge Coop er dansk fødevareproduktion langt fremme, når det gælder reduktionen af pesticider. Sådan er det desværre ikke altid med det frugt og grønt, vi får fra lande uden for EU. Derfor indfører Coop i sin nye pesticidstrategi et konkret forbud mod 37 problematiske pesticider, og Coop vil løbende udvide listen. De 37 pesticider er allerede forbudt i EU, men desværre tilladt i mange lande udenfor EU.

"Når vi ser på vores danske avlere, gør de det godt, og vi er sikre på, at hvis producenter uden for landets grænser gjorde ligesådan, ville vi allerede være rigtigt langt. Men indtil da, må vi som detailhandel tage sagen i egen hånd, og derfor indgår vi fremover ikke indkøbsaftaler med leverandører, som anvender en eller flere af de 37 pesticider," siger Thomas Roland, CSR-chef hos Coop.

Brugen af pesticider er også noget, der vækker bekymring hos danskerne. Nye tal viser, at tre ud af fire af de danske forbrugere er bekymrede over, at der er pesticidrester i vores mad.

THE VALUE BATTLE STARTED AS EARLY AS IN 2007 WITH MARKS & SPENCER



M&S made a choice that, for example, chocolate was to be based on fair trade.

This was/is possible because M&S has a private label-based range!

ETHICS IS THE NEW MARKETING PARAMETER

Price and quality are established factors in all supermarket chains, and new areas must therefore be found in which they can stand out from the crowd.

A value agenda is consequently needed!

The chains currently use this agenda via private labels.

THE VALUE AGENDA IS APPLIED ON ALL FRONTS!

Producers must signal shared values with the chain if they want their brands to be stocked on the shelves, otherwise they will be excluded from the supermarkets of tomorrow.

The supermarkets are increasingly following the value agenda of society, which is changing at a very rapid pace.

By taking ownership of the value agenda, the supermarkets can ensure that the credibility is equal to the name above the door of the store – and not the products. Private labels are a strong card in this battle. If the chain, and not the brand, is the bearer of credibility – a private label suddenly becomes an original authentic product and not a cheap copy.

KEEP AN EYE ON CARBON NEUTRAL/CARBON POSITIVE

Young people are serious about it!

'Not flying' is more important than 'travelling'.

18-25-year-olds believe that meat consumption should be regulated by the authorities.

Forbyder flyrejser: Gymnasium vil vise vejen - og tager kun tog og bus på studieture

Eleverne på Det frie Gymnasium i København nægter sig selv at flyve, selvom det oftest er billigst og hurtigst.

Det var eleverne selv, der mente, at et flyforbud var nødvendigt. Nu bliver de kontaktet af andre skoler, hvor eleverne vil gøre det samme. (Foto: Katrine Romme - P1 Public Service)

CARBON-NEUTRAL STORES

Lidl will open its first carbon-neutral store in Denmark in 2020.
Aldi Süd in the UK is the first carbon-neutral chain in the world. This happened in January 2020.

This makes new demands on suppliers – often at short notice.

The same trend is seen in foodservice.

THE SUPERMARKETS OF TOMORROW

Smaller stores with fewer products.

Focus on fresh products to eat here and now or at the latest in the evening.

The expectation is that consumers will shop when they are hungry.

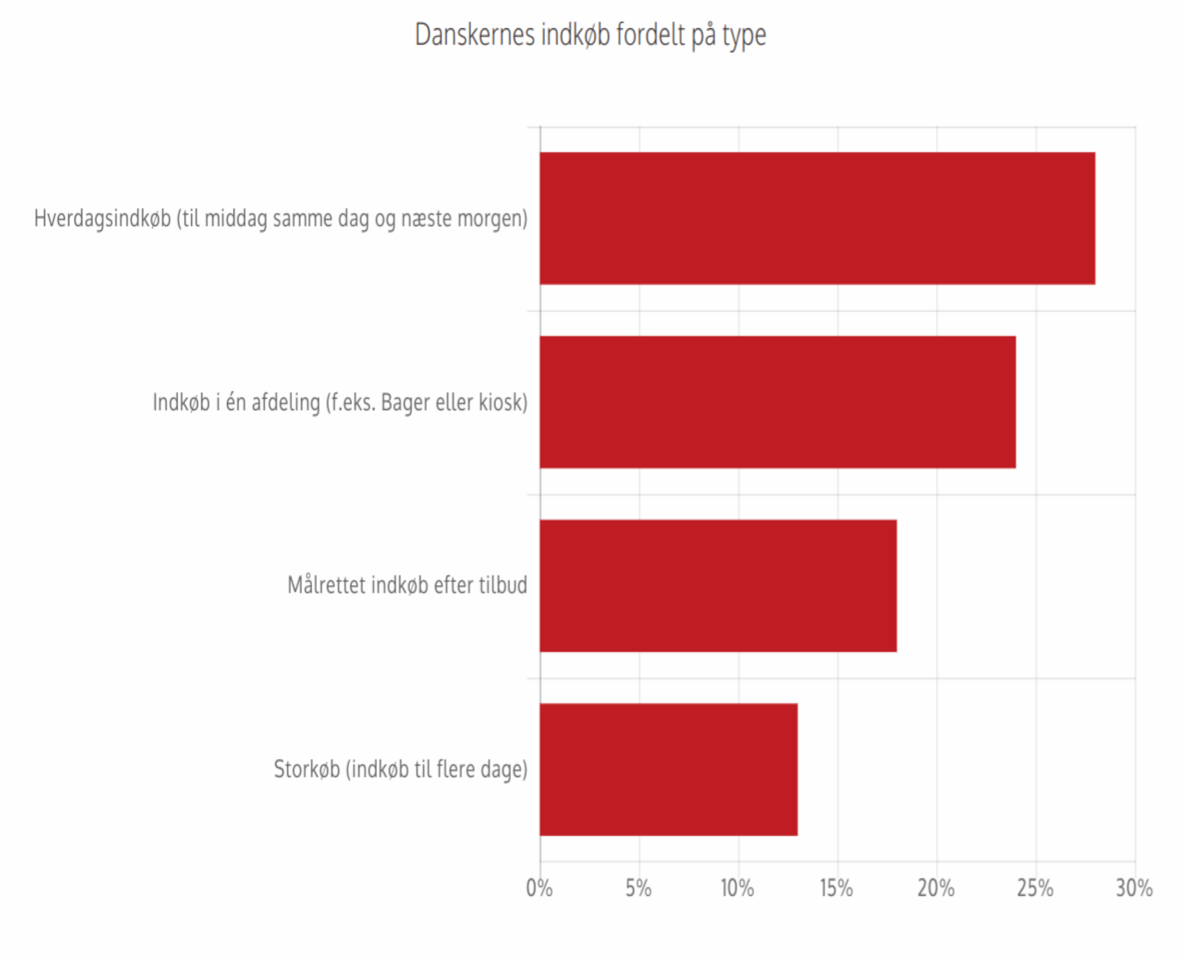
The range will consist of the products to which consumers show commitment.

NEW SHOPPING PATTERNS

When the shopping pattern normalises after COVID-19:

Consumers will be shopping more often.

The big weekly shopping trip will disappear – or may become a shopping trip.



Birch&Birch
FOOD TRENDS

WHAT CAN THE FUTURE BRING

Fewer big shopping trips favour:
- More convenience
- More fresh goods
- More private labels

Smaller store formats mean:
- Less shelf space = less space for the brand
- If the fresh goods are a private label, the credibility moves from the brand to the ‘name above the door’

ONLINE SHOPPING

Shopping for trivial goods is moved to online shopping:

- E-commerce
- Click ‘n collect

ONLINE GROCERY SHOPPING POST-CORONAVIRUS

When shopping patterns normalise after COVID-19, it must be expected that the e-commerce sector must focus on holding on to customers who have done their shopping online during the crisis.

A number of loyalty programmes must be expected from the e-commerce sector.

Click ‘n Collect has come to stay.

GET A HEAD START AFTER THE CORONAVIRUS

There will be much focus on food safety and hygiene. Hygiene MUST be rigorously enforced: in the supermarket when we eat outside, during transport, on packaging – everywhere throughout the value chain.

The packaging must protect us and the product from viruses – including on the products that we eat or drink immediately after purchase.

GET A HEAD START AFTER THE CORONAVIRUS

The buffet is dead.

More products will be sold in portion sizes!

What about sustainability with so much packaging?

The producers will be responsible for finding a solution to the dilemma of excessive packaging and sustainability.

It must be communicated clearly if the product has specific special characteristic features such as organic, gluten-free etc.

The overall product characteristics must outweigh the negative footprint left by additional packaging.

The coronavirus pandemic is expected to result in an economic crisis – and, in times of crisis, consumers traditionally go for ‘value for money’, which is not the same as ‘cheapest possible’.

Here, private labels will become an important factor for the supermarkets – because private labels usually occupy the ‘best value for money’ value position.

Often consumers also choose to postpone major purchases – and this can have a negative impact on restaurant and café visits.

OPPORTUNITIES RELATED TO WORKING FROM HOME

After the coronavirus pandemic, it must be expected that people will be working more from home

This situation should be exploited to think product development differently and to rethink the products.

Think market upscaling!

Restaurant visits can be converted to purchases of premium supermarket goods for 'home restaurant' meals.

Restaurants can focus on takeaway or meal boxes in new ways.

LOCAL PRODUCTS

Under the coronavirus crisis, consumers have become more conscious of buying products locally and supporting local jobs.

Local products have been given a boost – consumers are more involved by making purchases in, for example, farm shops and crowdfunding.

Trust in WHO we shop with has become a key word.

THE QUESTION IS THEREFORE

– IS IT THE BRAND

OR

– THE NAME ABOVE THE DOOR

THAT IS THE WINNER OF THE FUTURE?

NY BOG!

Birch&Birch
FOOD TRENDS

Firstmove
MAKE THE FUTURE SECURE

Extract from workshop

Firstmove

FIRSTMOVE: MAKE THE FUTURE SECURE

In the following, we zoom back out and adopt the big perspective when we look at the consumers of the future together with futurologist Kirsten Poulsen from Firstmove.

Firstmove is a strategy and development agency that provides valid insights into the future. Firstmove's source of insight is 'the chosen ones': the 3% – the first movers, those who are first with new behaviour. A behaviour that sets the standard and influences everyone else over time and completely unconsciously. First movers are human beings like everyone else, they merely have special personal characteristics and show a behaviour that differ in terms of time from the rest of the market.

By providing insight into first movers' current behaviour and needs, Firstmove supplies valid knowledge of trends that have not yet made themselves felt on the market and that the wide mass market will demand and base their shopping on in the future. Behaviour that manifests itself among first movers will subsequently spread to the commercially interesting mass market. First movers are 2-4 years ahead at industry and category levels, and 6-7 years ahead at value level. Who would not like to know what the market is demanding? When, why and how much.

Knowledge about first movers' behaviour and values can give you a head start of 4-7 years on the market.

Kirsten Poulsen

For a large number of years, futurologist Kirsten Poulsen has worked with future-based consumer insight and strategy through her company Firstmove, which conducts ongoing in-depth analysis studies of future values, lifestyles, needs, behaviour and shopping patterns.

"In future, there will only be room for one product, and that is the one that delivers best on climate"
- Kirsten Poulsen

Firstmove

Summary

New values set the stage for the consumers of tomorrow.

Pleasure is found in life and gratitude for the world and for being in the world. An urge to look after the world and where nature is worshipped. Consumption of resources is reduced right across the board. The modern consumer refrains from materialism. It will become embarrassing to buy something new – simply for the sake of buying it. Every purchase must have a purpose. Ascesis dominates over excessive consumption and value over volume. Transparency and honesty are in demand. Own health is optimised to be equipped to do more for the common health of society. Health must be for everyone – climate, the environment, people and production.

This paradigm shift is reflected in our shopping behaviour and consumption. Extra money is channelled into better and new food products. This means that organics are facing a future task. Organics must be seen as an idea – a holistic approach – and not a certification. Organics must be made topical and form a closer link with climate and sustainability values.

The retail trade must join the good fight. They need to think again if they are to continue to meet the needs of modern people. The need for convenience and eating out. For thinking value over volume. For demands for origin, location and season and for the requirement to adopt a holistic sustainability approach.

"Food can no longer taste good if the climate has suffered!"
- Kirsten Poulsen

First movers are driven by values

WHAT CHARACTERISES A FIRST MOVER?
*Open *Curious *Great adaptability *High risk appetite *High complexity *Able to handle insecurity *Uncertainty *Bold *Adventurous *Cosmopolitan *Extreme degree of socialisation *Social *Hyperactive *Innovative *Networks with other innovators and creators – worldwide

WHO ARE THE FIRST MOVERS?
Few lead the way → The first movers (3%)
Some follow → The next movers
Many then follow their lead → The mass market

FIRST MOVERS ARE NEVER A TARGET GROUP

ESTABLISHMENT OF FIRST MOVERS' BEHAVIOUR
= ESTABLISHMENT OF THE <u>COMING</u> BEHAVIOUR OF THE MASS MARKET 5-7 YEARS AHEAD

FIRST MOVERS' 8 BEHAVIOURAL VALUES

These are values that drive and explain behaviour. Value is something that is underway for a long time. Paradigm shifts are rare. Nor do epochal events like COVID-19 or Sars cause new behaviour. They may put some values on standby, or change some values a little faster, but, overall, they do not change behavioural waves that have been set in motion.

The following are the values that are expected to come into play towards 2025-2027

- **New sprouting:** Paradigm shift – radically different thinking – deep gratitude for life – feeling privileged – enjoyment is based on life, not commercialism – meditation – gratitude rituals – new energy and optimism
- **Bestainable:** Each choice is an opt-out – an active action – responsibility reaches new heights via greater awareness – taking care of the climate and the world – many pressing themes in relation to climate, food shortage, hunger and war, life capacity – credibility in actions – social sustainability. Attach multiple values to organics in marketing
- **Naturable:** Natural thoughts – finding back to the essence – living as cleanly as possible in harmony with nature – a feeling of being squeezed by the monoculture in nature – buying only natural products – making the green grow – is about ingredients, materials, packaging and products – nature is religion
- **Nothingness:** Nothing becomes everything – shaming of materialism – it is about austerity – every purchase must meet a function or purpose – quality and durability – acquisitions that go beyond oneself – eliminates the need for unnecessary purchases and experiences – the portions shrink – fashion has become unfashionable
- **Etiquette:** We must behave properly – equal treatment – increased awareness and conscience – increased demands for businesses to show propriety – value over volume – step into character – behave properly
- **Clarity of vision:** Transparency – clear talk – 100% transparency – tired of fake news – demands knowledge of environmental impact – credibility stamps – demands authenticity – spends money on saving the world
- **Joint health:** Health has become a joint issue – own health is optimised to contribute more to the joint health of society – the goal is to create a healthy climate, but also for people, animals, production and conditions
- **Own company:** New wave of individualism – need to recharge batteries and listen to own needs – time for reflection – opt-out of noise, including digital noise – value-based lifestyle – I am gearing up for more

FOOD TRENDS

"The following quotations are taken from first movers in the survey"

Firstmove

:Quality food

As a consequence fewer products and ingredients
Genuine, rustic products
With high satiety and nutrient density
And of much, much higher quality
For it fills you up

A narrow, curated range
Selected and composed by the producer
For retail does not master the task

High gastronomy is under pressure
Applies to both metal fatigue over nerdy approach
And the eternal talk of food
Which is becoming increasingly tiresome

"I eat to live (survive). I don't live to eat. That's my mantra. And has been for a long time."

:Climate food

A taste for climate is the new flavour
The seventh sense of taste
Taste historical parameter no. one

But better to compromise on taste
Than on climate impact
Otherwise, the product leaves a nasty taste in your mouth
Carbon footprint has established itself as a value
Much more with first movers than producers
Is the perception
And the experience

"Animal welfare is a generic requirement for me. My focus is on plant welfare. We are depleting soil conditions and creating worse and worse conditions for the green earth we are to live on"

:Plant-based food

Plant welfare is a new and essential welfare issue
Is about cultivating the land without force
Thus avoiding coercive maturation
And depletion of production areas

Sustainable nature care
Dynamic cycles such as biodiversity, permaculture/polyculture
Without chemical fertilizers or pesticides
Only natural fertilizer, where necessary

Carbon reduction must be documented in both production and freight
Season is a given parameter on the green table

"Plant welfare is very close to my heart. Everything must be cultivated with respect and consideration for how much green produce will constitute of our nutrition. It must therefore grow under the most favourable conditions"

:Deerly bought food

Animals have a voice and are shouting louder and louder
Anti-consumption and value consumption represent the animals' cause
Animal welfare or lack thereof
Is about the production itself/the mechanical processing
An industrialised animal life. And a life in captivity
Far from a natural animal life

Demand much, much better animal welfare
Is rarely experienced as a wholehearted effort
Where the animals' best interest is at heart

Lack facts and explanations
Understanding of why the animals' best interest is not at heart

Organics/free-range are the best picture of animal welfare
But not good enough

"I will not contribute to animal cruelty. Therefore, it's easier not to buy meat. But that doesn't save the animals"

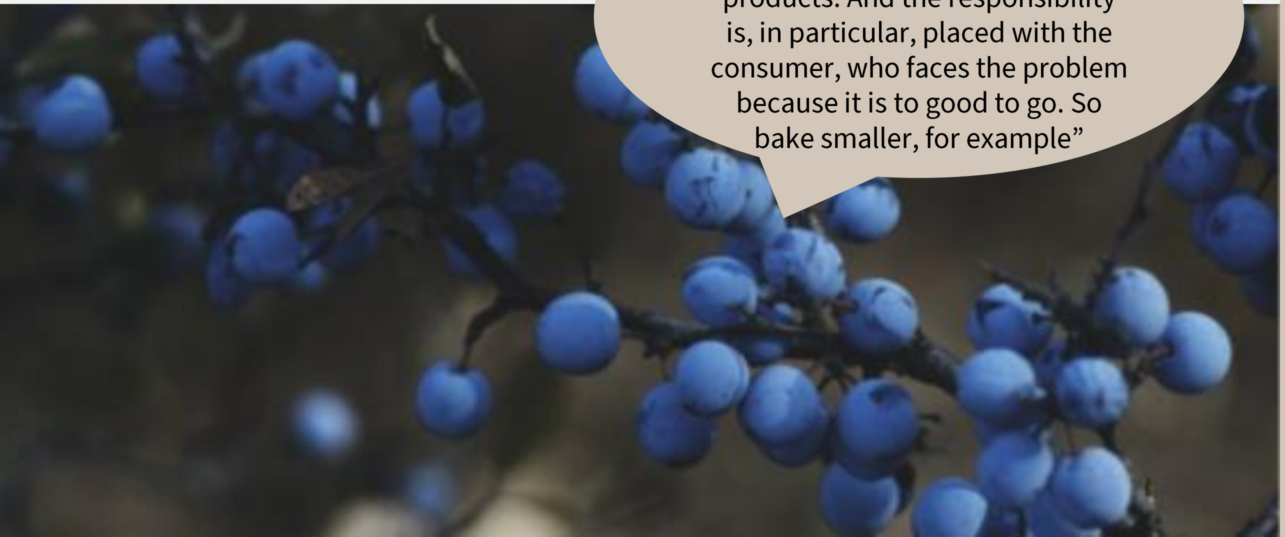
:Problem food

Food waste is attributed to the production stage
Not households

An inappropriate overproduction wastage footprint
And thus additional packaging wastage footprint
Which is an inevitable factor in food waste
Caused by overproduction

Overproduction of food products
Also constitutes biased distribution in a world of famine
A theme first movers take deeply seriously
And demand that producers do the same

"We especially have food waste because of overproduction. There is an eternal moving around of products. And the responsibility is, in particular, placed with the consumer, who faces the problem because it is to good to go. So bake smaller, for example"



:Problem plastics (packaging)

Packaging obviously has an impact on the survival of the planet
Plastic has had an ugly renaissance
All-in-single-wrap abundance
Is now experienced as a guarantee of safety and hygiene
But as a huge negative impact on the environment
Large demand for elimination of (over)packaging problems
It must, as a minimum, be made as environmentally friendly as possible

If the problem of packaging is not solved
It will have an effect on what we eat
Takeout, now canteen food, comes in an abundance of packaging
But also groceries stores constitute a huge problem
Because they do not make demands on the producers...

"There are large companies that enter the packaging industry, in different councils and locations, to influence types of packaging and use of good plastic. I'm glad that some people are taking it seriously."

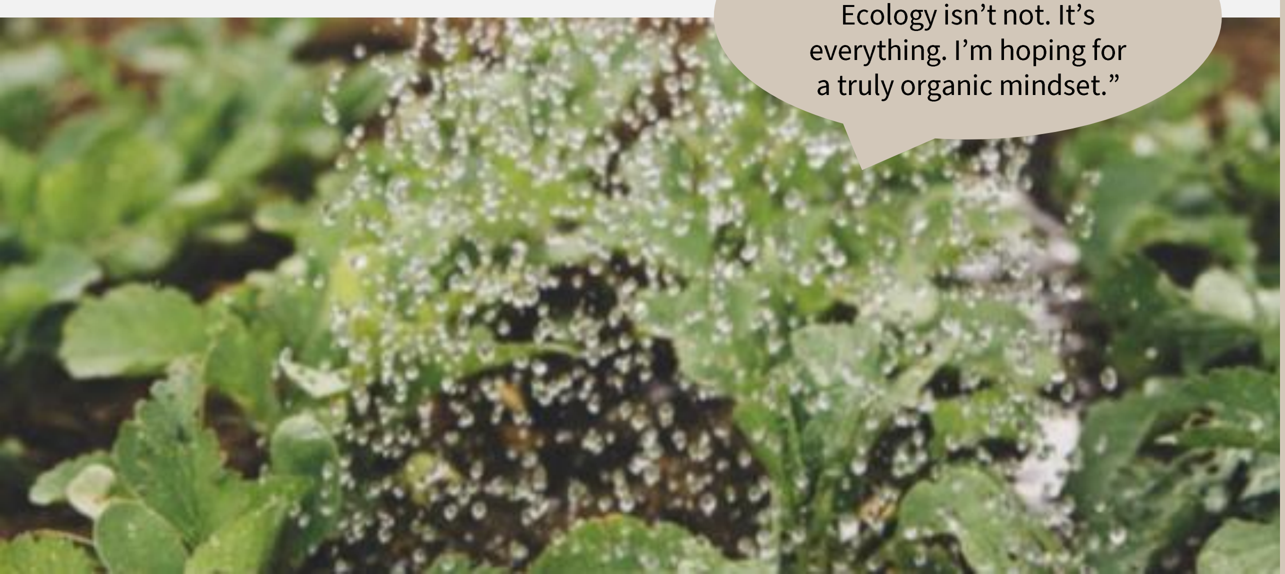
:Bio better

Organics are still problematic, ~~and~~ thus challenged
It’s been coming for a long time.
Isn’t ambitious enough
Has become a standardised product – but much preferable to non-organics
Focuses on commercialisation rather than value
Reduced to an adequate and, in many respects, poor stamp

Organics are about the holistic approach
Not the certification

Biodiversity is the buzzword. And needed at all levels
More biodynamic products need to find their way to the shelves
It’s not about the religious dimension of Rudolf Steiner
But about diversity and polyculture
The harmony of nature arm in arm with itself
A requirement for absolutely ages

“Not pesticides and not something or other. Ecology isn’t not. It’s everything. I’m hoping for a truly organic mindset.”



:Origin

Increased involvement in asking about the origin of raw materials
Local food/produced nearby more than hype
This entails both climate sense and security
Foreign imports are increasingly being bypassed
The focus is instead on Danish products throughout

Pay a higher price for what includes sustainability from A to Z
Which minimises dependence on the outside world/foreign countries
For example on local biogas from residual waste
And thus less dependence on imported diesel
Ergo. It is not enough to be sustainable
It must be produced sustainably locally

The local sustainability notion applies to the entire value chain

“The supermarkets will enter small-scale production of leafy vegetables and herbs, more small markets around the cities that get locally produced products, more competitors to Årstiderne”

:Danish

Therefore, there is a demand for much more/exclusively local food in the stores
Throughout the eating out/eating away culture
More small producers. Down to micro-locations, → micro-productions
Represented everywhere

Despite the local dimension
The food becomes more and more ethnically inspired
But, but, but based on a Danish starting point
I.e. Danish raw materials and possibilities

The locations came close. Too close
The world opened up again
With new local interpretations as spaces of opportunity
Closed down again due to the coronavirus

"We go to Thailand to eat authentic Thai food. We can't do that now. So we seek out Thai food at home. We seek locally what we previously travelled for. If you can't go to the mountain, the mountain must come to you. We grow global products locally, but without importation of ingredients"

:Passion

Food must taste of will
Of a passion for something better
Preferably also of the new
Far from the place of copies and 'good enough'

It is about future-proof production for mankind
Through the raw materials
Through the production method itself
Through a focus on diversity

There is no need for more coffee shops
Only for the one that does it so much better
There is no need for more aquavit, cold cut products, taste enhancers
Or Weber barbecues to grill the lump of meat to a crisp
There is only room for those who truly can and want something new
And better

"You can taste when they focus and concentrate. The new generation is different. They don't think about money and consumption like us. That's not what they think of first. They think about the future. And how you can create a future so that you're proud of yourself"

:Outsourcing

Lost interest in cooking. Long ago
Only little home cooking
Out of necessity to avoid industrial products
More eating out, away from home
But now less in restaurants

Less extravagance in general
As a more rational and down-to-earth approach to food
Backlash to gourmetification down to even the smallest cucumber
Greater flexibility, which even the top celebrity chefs now deliver on
Food has been outsourced
And has long not been the object of interest number one

“What I buy or eat out is clearly so much better than what I can cook myself. I prioritise my money, and time especially, on what others have spent time on and nerded to perfection”

:Better

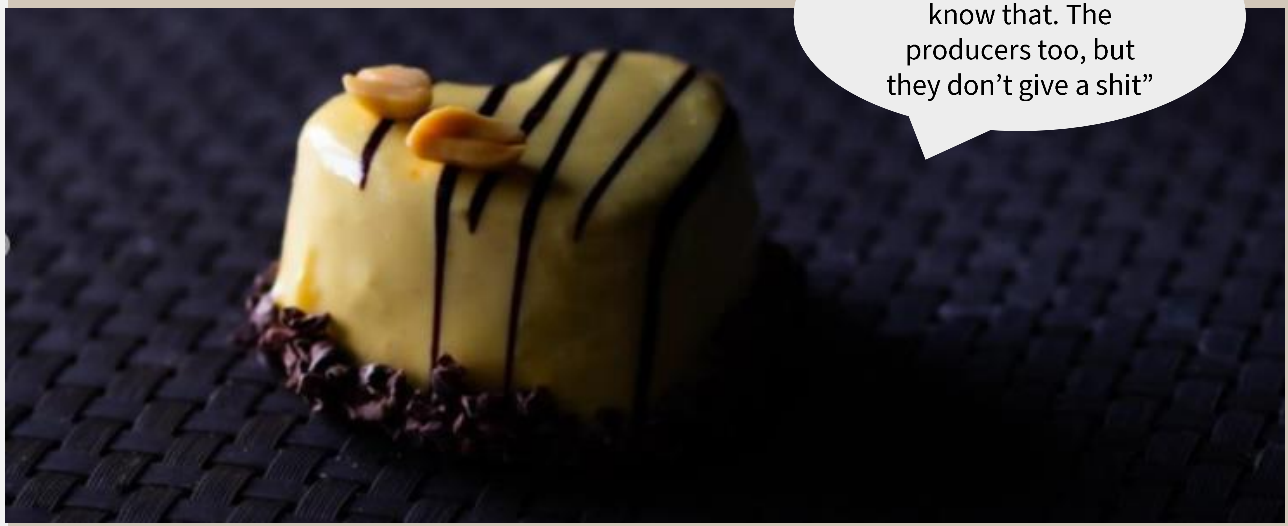
Cooked meals delivered to your doorstep
Rather than buying ready meals

The delivery is increasingly being shortened
And keeps the freshness, crispness and experience intact
Keeping the bacilli away and your face mask in the pocket

Still a chef who cooks the food
And acts as a guarantor
Not a robot or an assembly line. Or a factory

Or where retail just reduced the price an extra notch
At the expense of taste, health and sympathy
And proper settlement to the producer
Where the production is 1,000 or 10,000 instead of 100,000 units

“Mass production destroys the taste. We know that. The producers too, but they don’t give a shit”



:Upgrading

When you eat at home
The raw materials are upgraded

Fewer journeys, for example, release funds in your budget to live better every day
And upgrade the good values further

With shorter opening hours
Wednesday and Saturday suddenly become very similar when you go out

The eateries that cater to the local segment are doing well
But which also manage to focus on other activities
Than just the food
For example Bingo, Beefsteak and Brilliant Films in Sult, Cinemateket
Where the food takes on a more secondary role
Although it has to be of a good quality in itself

“That the joy is in eating and not the purpose of eating. It’s is a pure luxury thing that the purpose is in the very act of eating. It’s about eating effectively and where the taste is the primary filling characteristic. So that we eat less and produce less as a consequence.”

:Superfresh

Easy/convenience is really being scrutinised
Easy and tempting
Available right now
But the aftertaste. The compromises
The degree of freshness
The content scams
And how it affects your state of health
Is the eternally challenging remaining part of the solution

The keeping qualities for elimination of food waste
Goes against naturalness and freshness
A dilemma

“The daily question is how I can design myself even more sustainably and truly healthily. Here, most food solutions will fail.”

:Conservatism

Food innovation is very limited
The culture, or rather the tradition and this-is-how-we-always-to-things approach, is cultivated
To preserve it
Rather than to seek completely new food paths. To invent something new

But new eating behaviour calls for new eating cultures
Types of social interaction around food
That takes the food into the spirit of the times
Borne by the right values and parameters

Those with their heart in the idea
With focus on actual product change
Can be tasted all the way to the bone

"I've just been to a food award event on Bornholm. We were allowed to taste all 110 new products that will be produced this year. There's nothing revolutionary. Just adjustments and a few improvements on the existing product"

:Better payment

Very, very large willingness
To pay for sustainability
The attached values
→ Viable pricing

Feels right to invest in a sustainable, proper
And resilient food chain
And not eat "crap from China" and the rice fields

The values set the price
But must be demonstrable/documentable
And be based on great confidence
You cannot brand yourself out of it

"I pay for my value needs. It's that simple. But if I'm faced with a depleted tomato named 'From Egon', I will not pay a nickel"

:Price

Price is all about value redemption
The more values and parameters in play
The higher the price
And great willingness for this

Private labels are a thorn in the eye
A money-grabbing machine
That eliminates the essential
Like passion, courage and heroism
Quality is understood

First movers clearly favour economic sustainability
I.e. paying the price of the product
Cleansed of EU subsidy
For it is about prioritisation
And basic climate sense

"Tacos for example. Noma has a restaurant that has two tacorias. Three small pieces cost DKK 105. It's expensive. But it tastes heavenly. And it's therefore a success"

:Retail

Less and less retail purchases
Cannot meet food solution needs
Unable to take up a position
And eliminate unhealthy and bad, conventional products
The non-climate-friendly approach

A power factor
That stands in the way of the new. And future-proof solutions especially
That puts economy on best exposure shelf
Rather than quality, climate and health
Does not integrate small producers.
Just pretends to
Does not execute locally and thus in a differentiated manner

More purchases possible in the retail trade
If it solves the food solution needs
And meets the values

"You can't just say fuck you to nature. Carrots have different sizes. It requires expertise by the chef, producer and retailer. Otherwise, you're not smart enough to work with the raw material. And then you might as well continue to work with plastic bags"

:Offline

More and more money is now being spent on completely simple goods – the basic products
At the Torvehallerne food market, Løgismose, Mad & Vin food hall etc.
And in the specialty stores
Which will have a great renaissance. If they want to
But boiled down to the focus on the best raw materials
Which is the experience in itself
Not the fine shop wrapped in glamour

Increased focus on where the food products come from
How many, how and how capable of supplying
Have not experienced a concern about food shortages during the coronavirus crisis
But degree of supply has become a theme

"I make high demands. And I can permit myself to do so. For I can always find a producer or a place that can meet my expectations. When it comes to eating, the opportunities are many and the competition is sharp"

:Online

Online purchases are increasing
Because it is still easy
And now also secure

E-commerce, automation and robots are more than well regarded
Is no longer nice-to
But also need-to
Minimises loyalty to stores
It should be possible to do it much better...

Online purchases, preferably from producer
Without costly intermediaries
That push price up and product quality down
Explore the possibilities of direct trade
More and more
And practice it, where possible

"The coronavirus and the financial crisis in 2008 are small wake-up calls we get to make things simpler again. I think the reminiscence of luxury with 14 waiters around you will fade away."

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ORGANIC DENMARK

STØTTET AF

Fonden for **økologisk landbrug**