Export Boost Denmark & Sweden

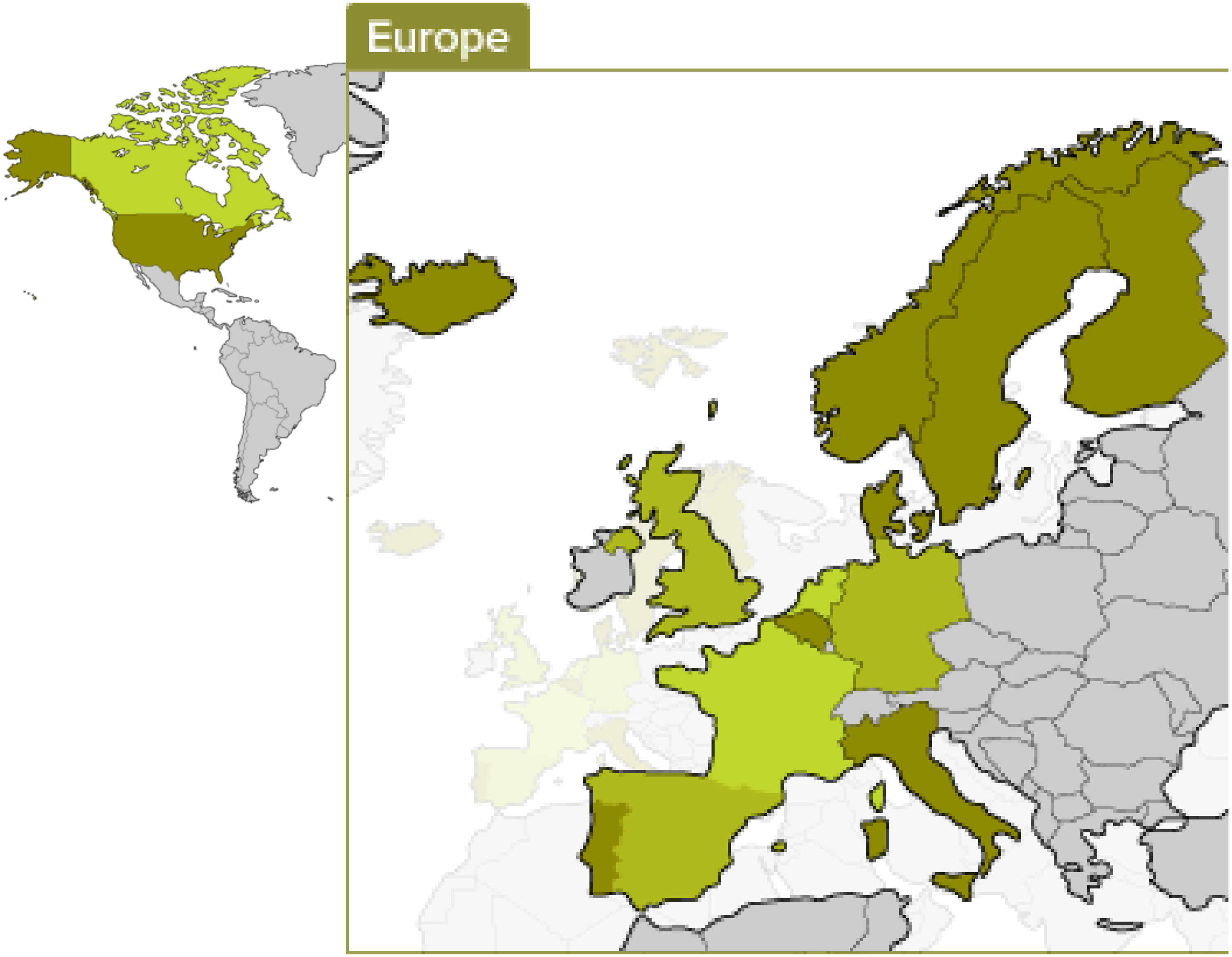
By Green Seed Nordics, Jacob True

12 September 2022

Contents

Green Seed Group

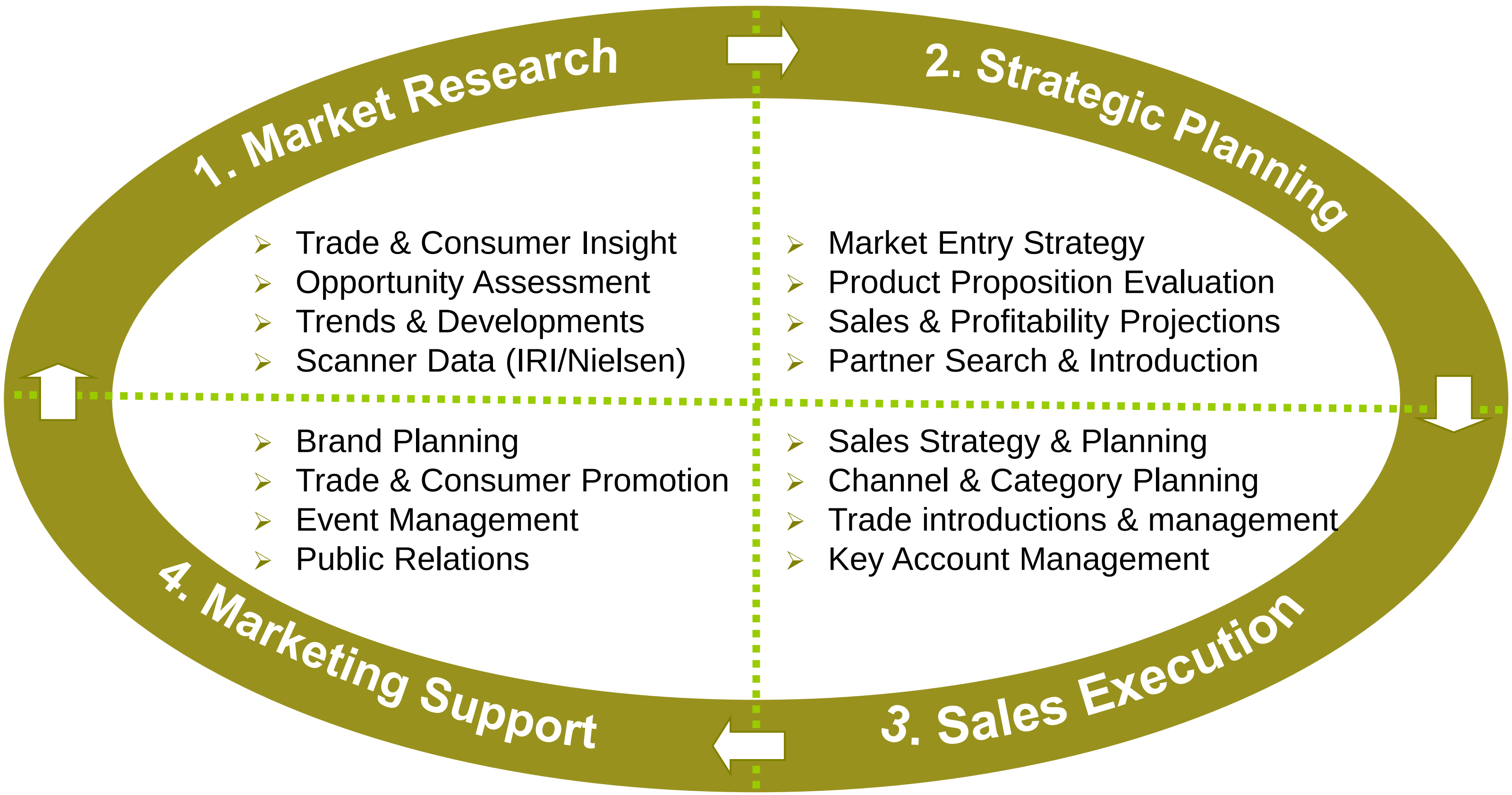
11 offices with focus on food & beverage



- Belgium / Luxemburg
- Germany / CH / A
- France
- UK
- Italy
- Netherlands
- US
- Nordic
- Poland/**opened 2022**
- Portugal
- Span

Green Seed

Covering all aspects of building and keeping Export



Green Seed Group

We are passionate about what we do

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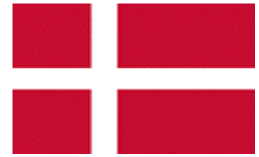
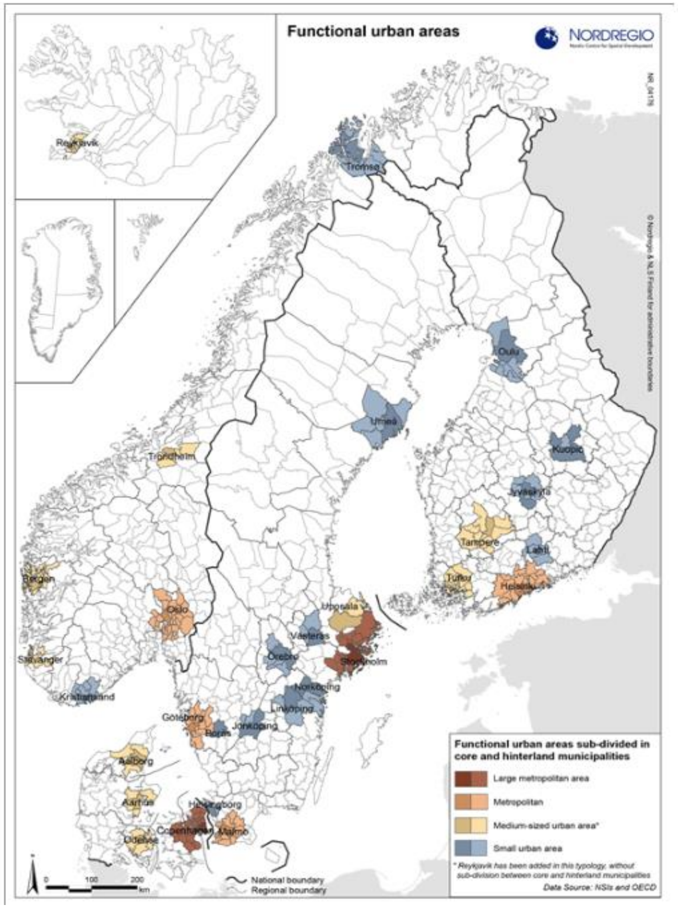
Denmark/Sweden at a glance



Key facts	Denmark	Sweden
Land area sq. km	43.094	385.199
Population	5.920.767	10.483.647
Capital /No.2	Copenhagen, Aarhus	Stockholm, Gothenburg
Intl. Status	EU-member since 1973	EU member since 1995
	NATO member	Independent till 2022
Age 0-14 years	0,164	17.7%
Age 15-64 years	63.3%	61.7%
Age 65+ years	20.3%	20.6%
Currency	DKK	SEK
One Euro/mid 2022	7,44 DKK	10.50 SEK
GDP per capita 2021	67.920€ (est.)	58.639€ (est.)
Unemployment 2022	2.5%	0,085
Inflation May 2012	0,074	0,074
Imports/top 5	GE21%, SW11%, NL8%, CHINA7%, NO 5% = 52%	GE18%, NL9%, DK7%, NO7%, CHINA6% = 47%
Exports top 5	GE14%, US11%, SW10%, UK7%, NO6% = 48&	GE10%, NO9%, US8%, DK7%, FIN6% = 50%
Agriculture Products	Milk, wheat, barley, potatoes, sugar beet, pork, rye, rapeseed, oats, poultry	Wheat, milk, sugar beet, barley, potatoes, oats, rapeseed, pork, rye, triticale
Source: National Statistics, CIA factbook 2022		

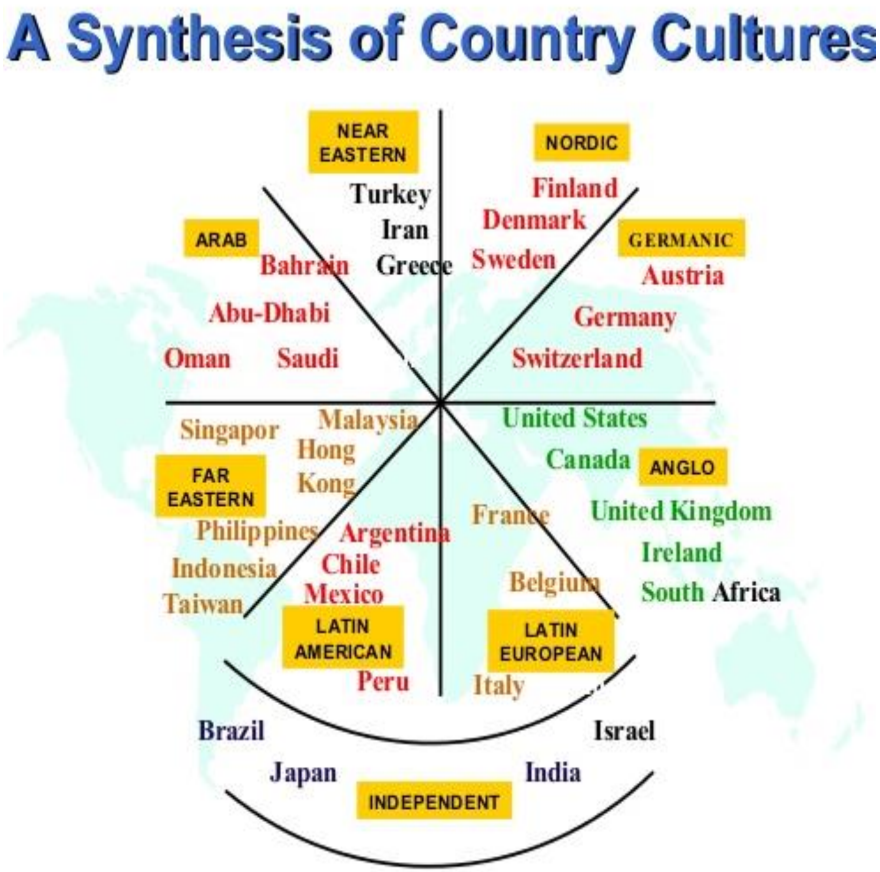
Demographics

- Almost 55% of the population live in the 30 largest urban areas.
- One-person households are quite common – nearly half of all Swedish households are single-occupancy.
- In 2021 the before(0-19 years) and after working-age(+65 years) share of the total population is almost 45% in both countries
- Gender employment rate: 48% women / 52% men
- 2/3 of Nordic women are employed full time.
- This is unique and can not be matched by any regions in the world
- All regions have their own characteristics



Business culture in Denmark and Sweden

- To the point, precise.
- Detailed and orderly.
- Follow-up is important.
- Long-term, organised approach.
- Open-minded to new products, concepts and innovations.
- Often takes time to get a business started but once it is up and running it will continue.



Food culture in the region

- The days when Danish and Swedish food was viewed as nothing but heavy, meat-based stews (though still dominant) **are long gone**. New Eating habits are developing as well as international influences.
- Amazing restaurant scene in Copenhagen and Stockholm
- **Cuisine varies** from the north (ie. reindeer) to the south (ie pork, ham). Dairy products are popular as are fish and shellfish.
- **Breakfast is very comprehensive** and often consists of cereals, bread, cheese or jam and coffee or tea. Every Inhabitant is taught from a young age that breakfast is the most important meal of the day.
- **Lunch** varies between Sweden and Denmark
- **Million of meals are served daily** from more than **30,000 public kitchens more so in Sweden than in Denmark**.
- In Sweden Free School Meals are a central part of the food culture
- In **Sweden**, since 2011 it has been written into the Education Act that all school meals should be nutritious. In **Copenhagen**, 90% of the ingredients in all public meals are organic.
- **Evening dinner** also consists of a warm meal: minced meat, meatballs/frikadellen, pork or veal for example.

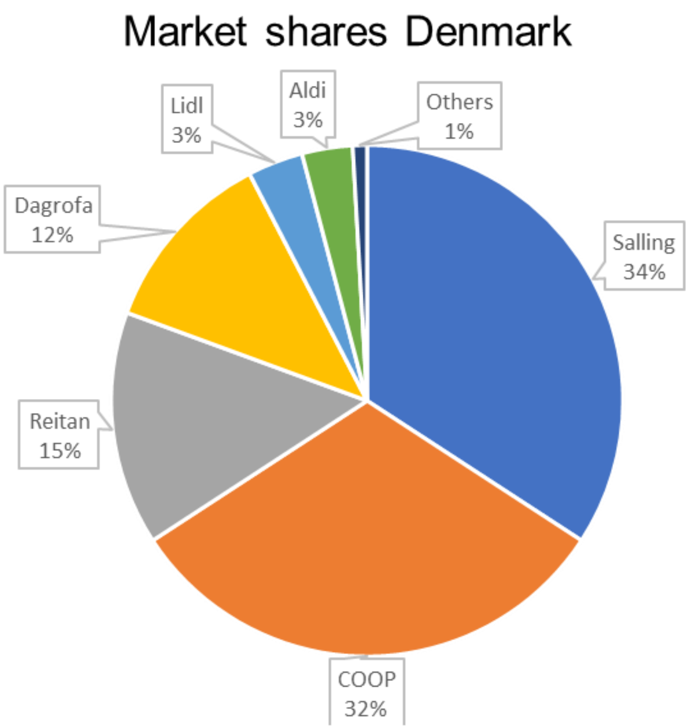
THE WORLD'S 50 BEST RESTAURANTS

Contents

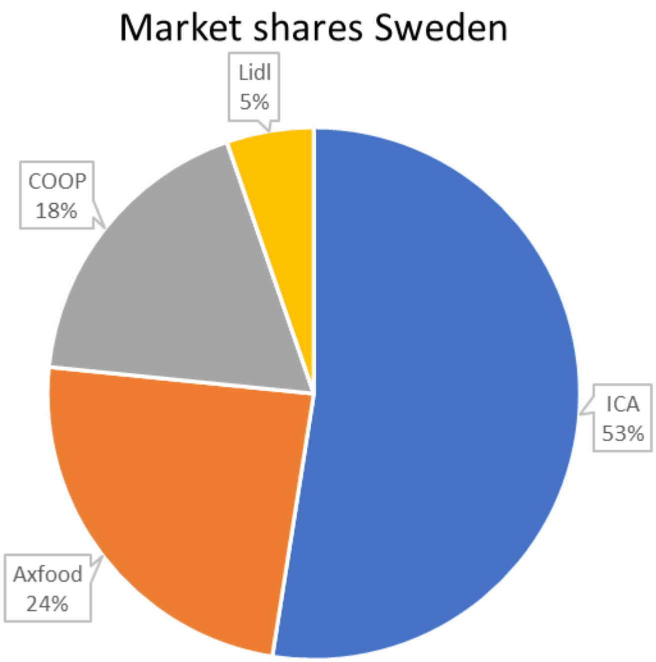
Grocery retail market

Total turnover 2021:

Denmark €19bn



Sweden €29bn



Source: Retail Trade Magazines

Key players Denmark

- Centralized buying and assortment decissions
- Centralized/centrally agreed conditions are executed well into all stores
- Private label negotiation and set-up via COOP Trading
- Turnover 45bio DKK/ 1.059 stores

Coop Denmark

Store concepts	Description	Assortment	Pricing
Dagli' Brugsen (LokalBrugsen included)	314 Small convenience food stores	Narrow product range. Fresh food	Higher prices
Super Brugsen	238 Supermarkets	Wide range of food products and fresh Foods. High organic penetration	Medium prices
Kvickly	80 Large super-/hypermarkets	Wide range Fresh food Family High organic penetration	Medium prices
fakta (Det ta'r kun 5 minutter), coop 365 discount	360 Discount stores	Everyday food items Organic discounter profile	Low prices
Irma	67 Premium Supermarkets	Leading retailer conc. Organic products Variety of premium foods	Moderate to high prices

Key players Denmark

- Centralized buying and assortment decissions
- Centralized/centrally agreed conditions are executed 100% into all stores
- Private label negotiation and set-up via AMS
- Turnover DKK 48,7bio
- 663 stores

SALLING GROUP			
Store concepts	**Description**	**Assortment**	**Pricing**
BILKA	19 Hyper Markets	Widest range of FMCG High number of organic products	Low prices
føtex	99 Supermarkets with Non-food/20 convenience stores: Føtex Food	Wide range of products Organic focus	Moderate prices
NETTO	525 Discount stores	Narrow range of products/In/out products High Organic focus	Low prices

Source: Retail Trade Magazines

Key players Denmark

- Centralized buying and assortment decissions
- Centralized/centrally agreed conditions are not executed 100% into all stores
- Private label negotiation and set-up via United Nordic
- Turnover DKK 16,8bio
- 649 stores

DAGROFA			
Store concepts	Description	Assortment	Pricing
MENY	111 premium Supermarkets	Wide range of fresh products.Premium profile with own deli/butchers.	Average prices
SPAR	134 Supermarkets/ Neighbourhood stores	Moderate range of products	Moderate prices
LET·KØB, Magasin, Min KØBMAND	397 Small Supermarkets Private ownership 6 Departement chain	Neighborhood stores Food hall Convenience	Higher prices
nemlig·com	1 Online store	Large product range	Moderate prices

Other Key players Denmark

- Centralized buying and assortment decissions
- Centralized/centrally agreed conditions are executed 100% into all stores
- Private label negotiation and set-up via AMS
- Turnover DKK 16,8bio
- 649 stores

- Lidl holds 3,5% of the Danish market with 150 stores.
- Rema1000 is owned by Norwegian Reitan group has 320 stores and a market share of 14,8%
- Aldi holds 3.2% of the Danish market share with 200 stores

Key players Sweden

- Centralized buying and assortment decissions
- Centralized/centrally agreed conditions are not executed into stores
- Private label negotiation and set-up via AMS
- Turnover SEK 151,6bio
- 1268 stores

ICA Sverige			
Store concepts	**Description**	**Assortment**	**Pricing**
	631 Small convenience Food stores	Narrow product range. Fresh food. Local.	Higher prices
	422 Supermarkets	Wide range of fresh foods, deli counter.,	Moderate prices
	128 Large supermarkets	Everyday food items Medium to high number of food products	Moderate prices
	87 Hypermarkets Extended open hours	Wide variety of foods Also non-food	Lower prices

Source: Retail Trade Magazines

Key players Sweden

- Centralized buying and assortment decissions
- Centralized/centrally agreed conditions are 80% executed into stores
- Private label negotiation and set-up via COOP Trading
- Turnover SEK 52,3bio
- 851 stores

COOP Sverige			
Store concepts	**Description**	**Assortment**	**Pricing**
Large	**82 Hyper/Large markets**	**Widest range of FMCG. High number of Food products**	**Low prices**
Medium	**384 Supermarkets**	**Medium to large assortment of fresh and grocery products**	**Moderate to higher prices**
Small	**385 Neighbourhood stores**	**Limited product range**	**High prices**

Source: Retail Trade Magazines

Key players Sweden

axfood

green seed International Food Consulting

- Centralized buying and assortment decissions
- Centralized/centrally agreed conditions are 70-100% executed into stores
- Private label negotiation and set-up via United Nordic
- Turnover SEK 69,5bio
- 858 stores

Axfood Sverige			
Store concepts	**Description**	**Assortment**	**Pricing**
WiLLY:S	211 Soft discount stores	Wide range of FMCG.. Fastest growing chain concept	Low prices
Hemköp	187 Supermarkets 68 Matrebeller	Wide range of products and organic products. Medium focus on organic.	Moderate to higher prices
CITY GROSS	42 Hypermarkets	Wide range of FMCG.. Acquired 2022	Low prices
tempo	350 Neighbourhood stores/different chains	Limited product range. Convenience	High prices

Source: Retail Trade Magazines

Other Key players Sweden

Lidl

- Centralized buying and assortment decissions
- Centralized/centrally agreed conditions are 100% executed into stores
- Turnover SEK 15,4bio
- 180 stores

Mathem

- Leading F&D on-line retailer
- Partly owned since 2022 by Axfood

Source: Retail Trade Magazines

Alcohol Liquor stores (Sweden only)

- Systembolaget is a government-owned chain of liquor stores in Sweden. It is the only retail store allowed to sell alcoholic beverages that contain more than 3.5% alcohol by volume.
- Systembolaget also sells non-alcoholic beverages, although this product segment represents less than half a percent of the company's total sales of beverages
- Buying takes place via Tenders that are publisiced, so You as a supplier have to wait until your product group is publicized
- The Tender contains is very specifically describing what Systembolaget is looking for

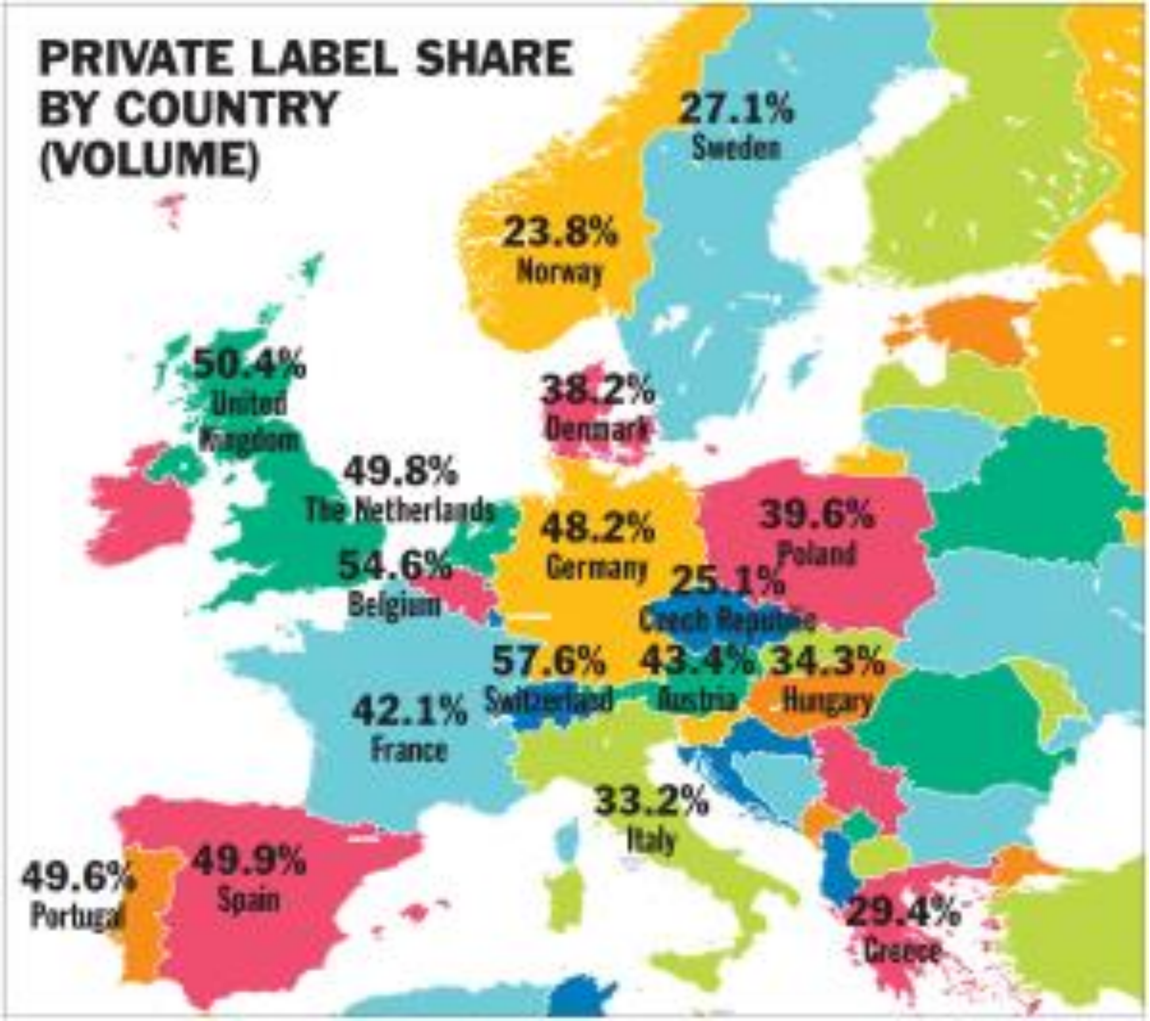
SYSTEMBOLAGET S	Procedures and Execution
Buying procedure	Centralized
Buying contact Network	1 contact initially
Distribution	1 point of distribution
Currency	EURO or SEK
Ways of marketing	None
Expectations	Aware of procedure
Expectations	Have read procedures
Private Label	None
Organic focus	Moderate
Web	www.systembolaget.se

Shopping and structure

	Sweden 	Denmark 
Structure	***High level of concentration in the food sector***	
Retail Shopping Habits	**Out-of-town centres: consumers like to use their cars for shopping**	**Retail concentrated in the 4 main cities: Copenhagen, Arhus, Aalborg and Odense**
Formats in growth	***Discount formats experiencing strong boost***	
Main Channels	**Major outlets + Strong hypermarket offer operating a large out-of-town format**	**Dominated by discount and supermarkets, as a result of planning regulations and low population density**

Private label shares

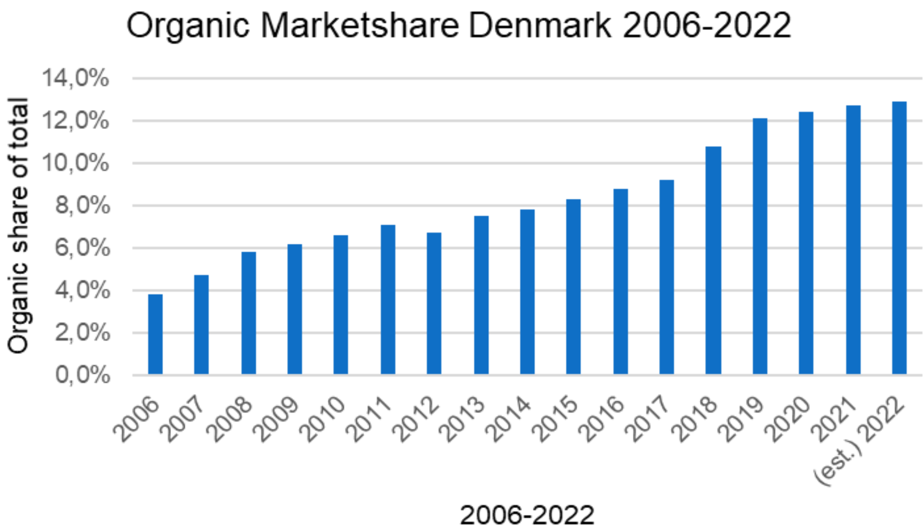
Rising food prices drives Private Label share growth
The PL penetration is significantly low in Sweden compared to most other EU countries

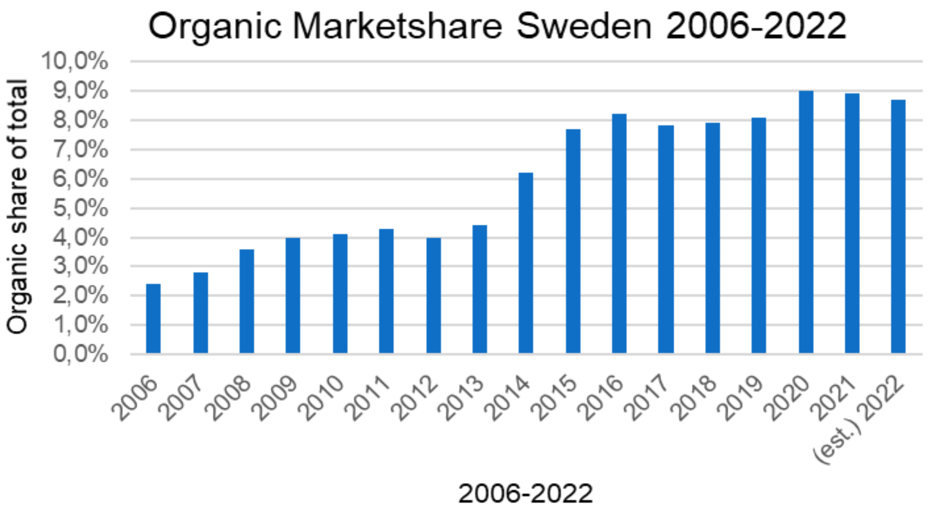


PLMA data 2022

Organic share of total sales

- Denmark worlds highst penetration of organic
- Sweden 5th largest





Source: Statistics Sweden(SCB),Statistics Denmark(DS)

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Foodservice

Nationwide Wholesalers:

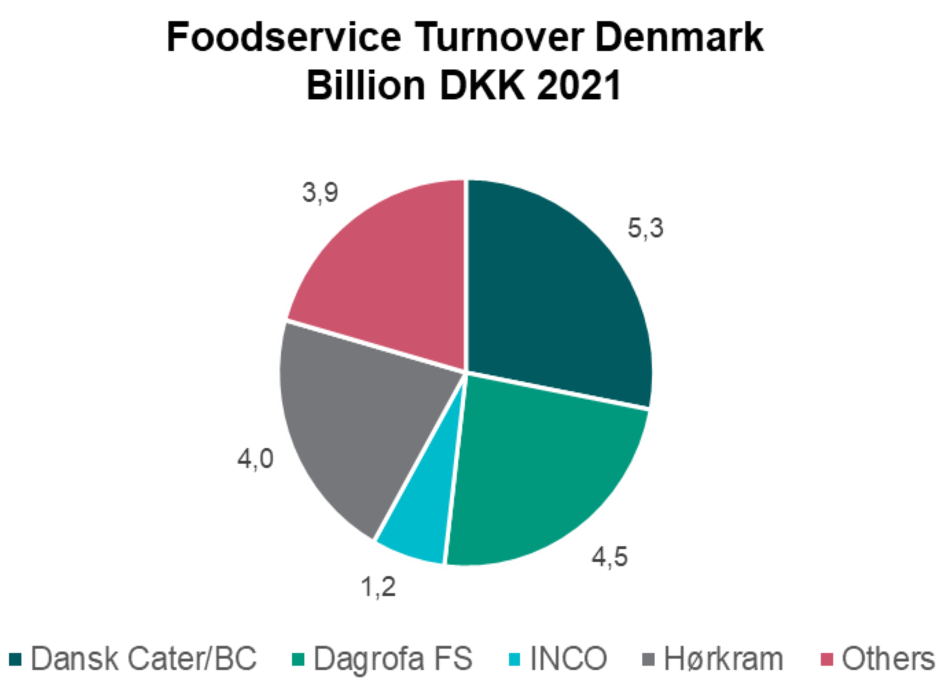
- The **public sector** constitutes some of the foodservice wholesalers‘ principal customers (schools, hospitals etc.), as well as the ‘**out-of-home sector‘** (restaurants, bars etc.) and leading **groups** supplying food service (Eurest, Compass, Gate Gourmet, Sodexo, among others) as well as **private chains** (restaurants, QSR etc.).

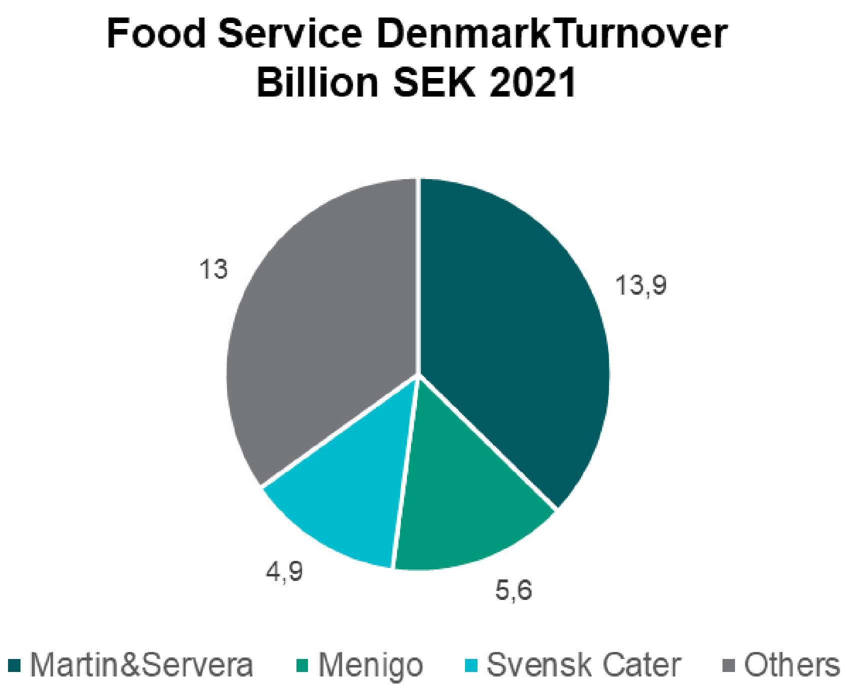
- The largest wholesalers are linked to **retail or international ownership** :Martin & Servera (Axfood retail Group), Menigo Foodservice (Brakes Group – one of Europe‘s largest) Dansk Cater and Svensk Cater (part of EuroCater) and Hørkram (Citti, Germany).

- The foodservice markets are fragmented and there many different whole sellers in both countries.

Key players Foodservice Denmark and Sweden

- 3 large Wholesellers dominate each market
- Being listed does not mean you are in distribution
- Key suppliers to Public Sector as well
- Outside the 3 large whole sellers in each market there are several smaller set-ups whereby you can reach food service customers





Source: Retail Trade Magazines

Top 3 Foodservice Whole Sellers in Denmark and Sweden

PUSH & PULL approach

Key customers

Top 3 Whole Sellers

Denmark:

Sweden:

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Ica's future report:
The store of the future is several different stores

- The traditional store will continue to play an important role in the future, but the stores will look more different. This is shown by Ica's future report 2022, which aims at the physical store. Other insights are that the customers of the future place high demands on a simple, calm and pleasant experience in the store as well as a holistic approach in terms of sustainability.
- Demographic changes, a **greater interest in food** and **increased demand for special diets**
- From the consumer's perspective, a good store is characterized by being orderly and easy to find (69%) and that it has a large and good range of **locally produced goods** (44%) and knowledgeable staff (43%). In parallel with this, however, there is a desire for the store of the future to be designed more to respond to being calm, relaxing and calm (47%). There is also a demand for the **healthy and wholesome** (38%) as well as the caring and compassionate (33%). **Sustainability** is also important for consumers and in several respects sustainability perspectives are demanded in the store of the future.

green seed
International Food Consulting

Retail Trends in Denmark and Sweden

1. **Health trend is the most outspoken trend right now**: takes different ways in Denmark and Sweden.Health is very much associated with Organic in Denmark whereas in Sweden it is more related to a healthy lifestyle: focus on fitness, protein, low-carb, diets are examples

2. **Vegan**: plantbased, vegetarian, vegan.

3. **Organic** has been a trend for years and still is in Denmark followed by Sweden

4. **Substainability:** plasticfree, less energy, onlibe vs psysical store

5. **Free-From:** i.e Glutenfree, is big Sweden and is growing in Denmark.Dairyfree growing

6. **Local sourcing:** consumers shopping from farms, retailers/foodservice sourcing locally

THE GLOBAL GOALS
For Sustainable Development

1. Health trend

- The health trend has long been one of the most dominant consumer trends in Sweden and Denmark. It is a trend that constantly takes on new expressions as consumers' perceptions of what is healthy change.
- In Denmark Health is very much connected to buying Organic whwreas in Sweden it related to an overall healthy lifestyle including fitness, being in nature, eating healthy
- **Protein:** the training world's focus on protein has become mainstream and more and more protein-rich and protein-enriched foods are being launched in especially Sweden which the n influences the Danish market. The new products are launched, among other things, as healthy and simple snacks, for example drinking pork, and as healthier alternatives to established carbohydrate products, for example bean paste.
- Collagen: apparently good for the skin. Growing rapidly in Sweden – seen in soft drink. Whether adding Collagen is healthy remains to be seen, however it is a trend right now and show that health is more than just being healthy..

Source Macklean insights

1. Health trend

- **Measuring exercise**. Last year's Christmas present was an activity bracelet as a response to many consumers' desire to measure their exercise and share the results on social media. ICA has taken the trend one step further with its health app where exercise sessions are converted into discounts on selected goods.
- How does the ICA Health discount work?

We give you more discount the more you move, and it is the number of active minutes that counts when we add up your discount. The app rewards normal pace and fast pace, and you can also get extra discounts by completing one or more challenges.When you reach 25%, the discount is ready to be loaded onto the ICA card. And it's exactly what it sounds like: you get a 25% discount, which you can use on five products of your choice within the ICA Gott liv range

Source ICA

1. Plant based trend

- The increased appetite for meat-substitutes in Sweden is not only linked to consumer demand – but also to category development. Retailers and manufacturers have successfully worked together to meet shoppers' increased desire to put animal ethics, sustainability, and health at the center of their plates.
- Meat-free days are becoming the norm especially in Sweden, and an increasing number of consumers identify themselves as flexitarians demanding alternatives that are fresh, easy to use and convenient.
- Volume sales of Fresh Meat alternatives grew more rapidly than frozen variants in Sweden. The volume increased by more than 7 %. Sweden experiences a decline in the sales of frozen meat substitutes
- In Denmark there is also growth in vegan categories. Especially within dairy products and frozen food.
- 3% of Danes are vegetarian whereas 9% of Swedes are Vegetarian (**Source: COOP analysis**)
- In Sweden 70% of meatfree total sales is Frozen out of estimated SEK 1,1bio meatfreee sales
- Sweden represents one of Euroeps largest meatfree markets whwreas Denmark is one of the smallest.
- In Denmark the Plantbaed trend is seen more within the dairy category with products like plantbaseed butter from Naturli brand
- Flexible vegetarians:more and more people want to eat more vegetarian, but without becoming full-time vegetarians or vegans. IKEA hasr started serving vegetarian "meatballs",

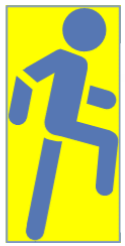
Source NielsenIQ

3. Organic is becoming Mainstream

The organic Staircase

Milk
Bananas
Egg
Vegetables/Fruits
Potatoes
- Oatmeal

Pasta
Meat
Flour
Butter
Juice



Rice
Cold cuts
Rye bread
Cheese
White bread

Chocolate
Ice Cream
Coffee
Tea
Cocoa

Cookies
Soda
Wine
Beer
Cornflakes

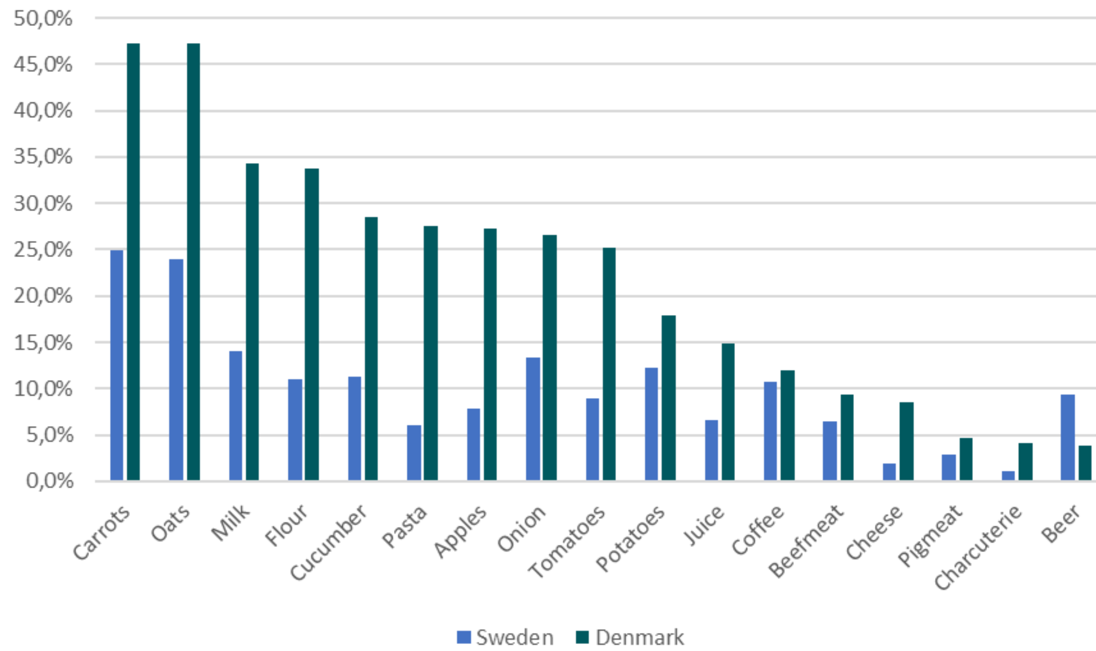
Initially the basic products in demand - Over time the consumer and the market develop.

- **Source: COOP Analysis**

3. Shares of various organic products

Most popular categories

- Fruit and Vegetables
- Dairy
- Grocery
- Alcohol(Sweden)
- Meat



Source: Organic Organisations Denmark/Sweden

3. Organic in Public Sector

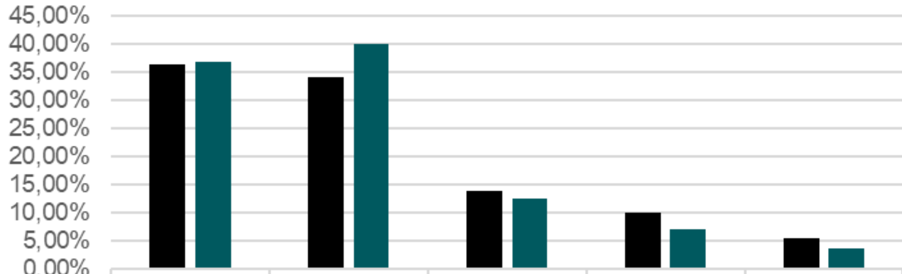
All Buying of food&drink to be 60% Organic by 2030





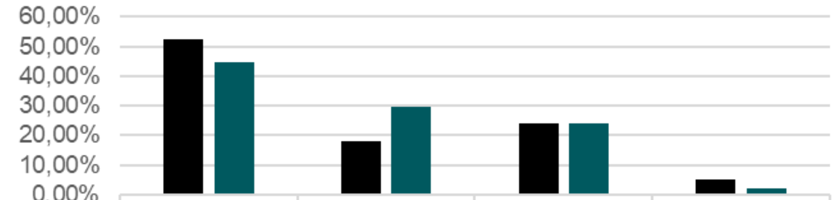

3. Top Organic Retailers

Denmark Retail Groups General Marketshare vs Organic Marketshare 2021



	Salling	COOP	Rema	Dagrofa	Others
General	36,50%	34,20%	13,90%	9,90%	5,50%
Organic	36,80%	40,00%	12,50%	7,00%	3,70%

Sweden Retail Groups General Marketshare vs Organic Marketshare 2021



	ICA	COOP	Axfood	Lidl
General	52,50%	18,10%	24,10%	5,30%
Organic	44,60%	29,50%	23,90%	2,00%

Source: Trademagazines/organis organisations

4. Substainability

- Sustainability in trade in 2022 goes from megatrend to a premise.
- Retailers and Foodservice are having increase focus on this megatrend
- Especially hen it coms to Private Label trends i.e. COOP trading are looking to place more demands on their suppliers related to ie. Use of plastic, use of packaging, energy and transport
- Suppliers like Swedish Zeta and especially COOP Sweden are moving their transport over to train transport. Today, about 35% of Coop's transports are run by train, the highest proportion of all food companies.
- Swedish COOP has launched sustainability declarations in its shopping app in a move that the retailer is calling ‘revolutionary’
- Specifically, Coop’s Declaration of Sustainability assesses how much or how little a product affects the climate, the environment and society based on ten different areas. For example. the risk of a negative impact on biodiversity or poor working conditions during production.
- By scanning the barcode of an item, the customer receives information about the product’s footprint based on ten different areas related to climate, environment and society.
- All supplies have been submitting details about the company and it´s products

4. Free-from

- In Sweden, 1–2 percent of the population has gluten intolerance, or celiac disease as it is also called. That is relatively much compared to other countries.

- Plant-based dairy products are becoming increasingly popular with Danish and Swedish shoppers. Lactose avoidance, especially amongst the younger generations, plays a principal factor, with those who avoid lactose often prioritizing the same concerns as those who limit meat consumption.

- Denmark observed the fastest volume growth of drinkable dairy substitutes Denmark (+10%) and Sweden (+9.6%). Within dairy substitutes we observe a clear trend towards products that are based on Oat. It is not only plant-based products that are outgrowing traditional dairy. Lactose free and lactose reduced dairy products are increasingly gaining traction.

6. Local sourcing

- In one of the most extensive marketing initiatives ever, ICA urges people to continue to choose Swedish goods and contribute to a better future for a vibrant Swedish agriculture. At the same time, ICA's work with assortment development and broadening the range of Swedish and local goods continues, as well as important efforts to facilitate Swedish and local food production through ICA's order portal for local suppliers, adapted purchasing processes and extended and clear guidance to Swedish and local products in stores.
- Increased Swedish share in the range by relocating production from abroad. ICA today has the market's largest range of own goods with the "From Sweden" label, but the work continues with conversion to Swedish raw materials, quality transfer and innovation, in close cooperation with the food industry and primary production. Large movements in both dairy and meat
- With few exceptions, Sweden and Denmark are far from self-sufficient in food and drink, so both countries are distinctly dependent on imported products.

Contents

Central buying Procedures and Execution

Procedures and Exacution	Denmark Branded Approach	Sweden Branded Approach	Private Label
Buying procedure	Centralized	Centralized	Centralized
Buying contact Network	Category Manager/ assisting Buyer	Category Manager/ assisting Buyer	Buying Manager / PL Buyer/Quality controller
Distribution	Centralised DDP/DDU	Centralised DDP/DDU	FCA or DDU
Currency	EURO or SEK	SEK	EURO
Execution into stores	100%	Supplier need to activate stores	100%
Ways of marketing	Central Campaigns	Stores Approach	na
Expectations	Willingness to Support	Local set-up	Prequalify
Expectations	Preparation/Knowledge	Preparation/Knowledge	All relevant Accreditations
Expectations	Promotional discounts	Field Sales force	Lowest price
Private Label	Can be initiated by Category buyer	Can be initiated by Category buyer	PL Buyer / Tender
Private Label	Via Intl Buying Group	Via Intl Buying Group	Via Intl Buying Group
Organic focus	High	Medium	High

Launch windows for all product categories

Step in process / Revision week:	Jan 3	Feb 7	Mar 11	Apr 16	May 19	Aug 33	Sept 36	Sept 40	Oct 43
1. Suppliers must notify customers and submit item information according to the implementation guide* for item notification (may exclude food information).	23-Sep	21-Oct	18-Nov	06-jan	20-Jan	31-Mar	28-Apr	26-May	16-June
	38	42	46	1	3	13	17	21	24
2. Supplier presentation for chain/concept	14-Oct	11-Nov	9-Dec	27-Jan	10-Feb	28-Apr	19-May	16-June	4-Aug
	41	45	49	4	6	17	20	24	31
3. Product range listing decision	11-Nov	09-Dec	20-Jan	24-Feb	10-Mar	26-May	16-June	11-Aug	01-Sep
	45	49	3	8	10	21	24	32	35
4. Complete trade item information including food information and the product image (marketing and planogram image) shall be sent for quality assurance*. See note. In this step, suppliers must order quality assurance in accordance with the GS1 standard	18-Nov	16-Dec	27-Jan	03-mar	17-Mar	2-June	30-June	18-Aug	08-Sep
	46	50	4	9	11	22	26	33	36
5. Trade item information & product images must be quality assured and approved in accordance with the GS1 standard	25-Nov	06-Jan	03-Feb	10-mar	24-Mar	09-June	07-July	25-Aug	15-Sep
	47	1	5	10	12	23	27	34	37
6. Detailed product range listing decision to supplier as well as a dialogue between the chain and supplier about forecasts	02-Dec	13-Jan	10-Feb	17-mar	31-Mar	16-June	04-Aug	01-Sep	22-Sep
	48	2	6	11	13	24	31	35	38
7. Bar Code must be quality assured and approved in accordance with the GS1 standard.	16-Dec	27-Jan	24-Feb	31-Mar	21-Apr	07-July	18-Aug	15-Sep	06-Oct
	50	4	8	13	16	27	33	37	40
8. Preparation for launch/phase out	09-Jan	06-Feb	06-Mar	10-Apr	01-May	07-Aug	28-Aug	25-Sep	16-Oct
	2	6	10	15	18	32	35	39	42
Revision area	Jan	Feb	Mar	Apr	May	Aug	Sept	Sept	Oct
Revision week, 2023	3	7	11	16	19	33	36	40	43
Revision date, 2023	16-Jan	13-Feb	13-Mar	17-Apr	08-May	14-Aug	04-Sep	02-Oct	23-Oct
1. Dairy		X			X		X		
2. Juice/Nectar		X					X		
3. Cheese		X			X		X		
4. Charcuterie, meat, bird and deli			X				X		
5. Chilled Vegetarian Products			X				X		
6. Chilled ready meals, meal supplements			X				X		
7. From the sea			X				X		
8. Fresh bread		X					X		
9. Dry biscuits, crackers, hard bread, soft buns		X					X		
10. Frozen food & Ice Cream			X					X	
11. Hot drinks and related items		X				X			
12. Cold drinks	X			X			X		
13. Snacks	X					X			
14. Confectionery		X			X		X		
15. Fruit & Berries, Desserts	X					X			
16. Cereals, muesli, porridge	X					X			
17. Canned food, soups			X					X	
18. International food	X					X			
19. Flavourings		X				X			
20. Pasta, rice, mashed potato				X					X
21. Baking & sweetening products			X					X	
22. Food hypersensitivity				X					X
23. Child care				X					X
24. Animal				X				X	
25. Laundry, cleaning, dishwashing			X				X		
26. Paper				X				X	
27. Disposable items			X			X			
28. Candles, napkins and disposable items	X					X			
29. Hair care	X					X			
30. Body care, facial care, shaving products, toiletries			X				X		
31. Oral care	X					X			
32. Intimate care		X						X	
33. Make up	X				X	X			X
34. Health	X						X		
35. Non-prescription drugs			X			X			
36. Tobacco	X				X			X	

Start 16 weeks before potential launch (no guarantee)

	Weeks before in-store launch:	-15	-14	-13	-12	-11	-10	-9	-8	-7	-6	-5	-4	-3	-2	-1	0
No.	Activity week:	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
1	The supplier notifies the customer and sends in trade item information																
2	Supplier presentation for chain/concept																
3	General product range listing decision																
4	Complete trade item information sent for quality assurance *) see note																
5	Quality-assured and approved trade item information & product images																
6	Detailed product range listing decision to supplier																
7	Preparation for launch/phase out																
8	Start of implementation onto store shelves																

Week 1
The supplier notifies/registers with customer and sends in trade item information. If complete trade item information is prepared, this is sent in now.

Weeks 3 – 4
Supplier presents trade item with product sample, and product information, etc. to chain/concept.

Weeks 5 – 8
General product range listing decision based on the information presented by the supplier in the trade item notification.

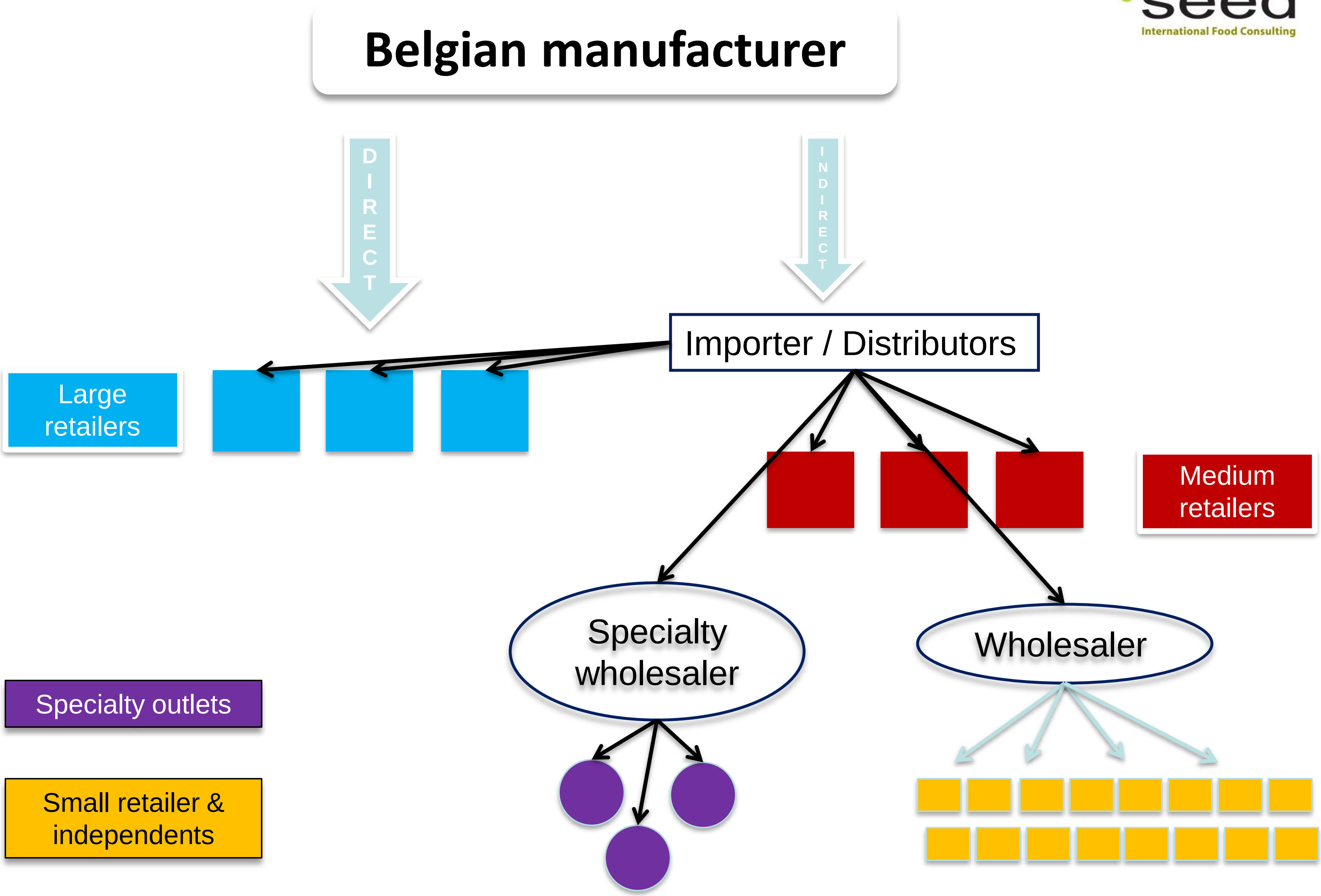
Weeks 1 – 9
Supplier sends in complete trade item information. Ensure that this is sent well in advance so that there is time to approve the quality assurance.

Weeks 1 – 10
Quality-assured trade item information & product images

Weeks 9 – 11
Final listing decision

Weeks 9 – 15
Preparation for launch or phase out of trade item and implementation of activities (planogram, product acquisition, sell-in at stores, etc.)

Week 16
Start of implementation of product range change on store shelves – in-items or out-items



Belgian manufacturer
DIRECT
INDIRECT
Importer / Distributors
Large retailers
Medium retailers
Specialty wholesaler
Wholesaler
Specialty outlets
Small retailer & independents

Market Entry Routes

Choosing a Strategy

Method of market entry is depending on a number of factors, the key one being the selected market and its structure. This includes as well, but is not limited to financial resources, sales volumes, marketing strategy, short-term goals, long-term goals, type of product and the target segment.

On-line	Definitely a route that will grow. So everybody should have a clear strategy. I.e. Amazon or Alibaba. Or your own set-up.
Direct to Retailer	Depends predominately on market (centralized) and retailer. Needs a minimum of volume and ROS. Definitely for PL business. In these cases, the retailer may manage all importing dealings and logistics to store.
Importer/Distributor	The importers act as distributors and sell (at marked-up price).Classic approach.
Joint Venture	Depending on the product, sometimes a strategic marketing alliance can be arranged with i.e. a local manufacturer.
Local Subsidiary	Setting up a local operation is a task that requires a lot of up-front and ongoing investment. More applicable for large markets.

Export via e-commerce

“Before anything else, Preparation is the key to Success” *

OPPORTUNITIES	CHALLENGES
➔ Denmark and Sweden are high income areas	➔ Distribution costs are high due to small volumes (especially in the start-up phase)
➔ Openmindness towards new suppliers	➔ It requires perseverance to establish yourself in a new market
➔ Private Label Opportunities undeveloped (especially Sweden)	➔ Takes time to establish a close relationship with buyers
➔ Opportunities within Organic / Set goal of 60% organic share of all public buying by 2030	➔ Competition from local suppliers
➔ Stable economic conditions	➔ Expensive Set-up with Field Sales (Sw)
➔ Positiveness from buyer’s vs Belgium	➔ Necessary with local Knowledge
➔ Opportunities for Branded value-added new propositions in Retail and Foodservice	➔ Research/Preparation is necessecary Start by visiting Denmark and/or Sweden

*Alexander Graham Bell

Thank you!