UK Trade
& Investment

SEAFOOD EXPORT PROFILES
DENMARK SECTOR REPORT

Prepared For:	Sea Fish Industry Authority
Produced By:	Joanne Ganthier
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SECTION 1 – MATCHING PROFILE

1.1 THE TRADING ENVIRONMENT

KEY FIGURES	
Population (Jan 2014)	5.6 million
Land Area	42,916 sq km
Inhabitants per sq. km	131.1
No. of households	2,621,249
Capital	Copenhagen
Other Main Cities	Aarhus, Odense, Aalborg
Language	Danish
Religion	Protestant (90%)
Currency	Danish Kroner
Exchange rate Euro/£	€1=7.45 DKK £1=9.45 DKK
Total GDP (2014)	DKK 466.2 billion
Real GDP growth rate (2013)	0.4 %
GDP per capita (2013)	DKK 277,500
Inflation (2013)	0.8%
Unemployment rate (2013)	4.1%
International status	Member of the EU
Government Type	Constitutional Monarchy
Government	Coalition of The Social Democrats and The Social Liberals
Total imports 2013	552,269 million DKK
Total exports 2013	625,217 million DKK
Total imports from UK 2013	28,792 million DKK
Total exports to UK 2013	53,567 million DKK
Top import countries	Germany, Sweden, Netherlands (UK 6^{th})
Top export countries	Germany, Sweden, United Kingdom

Source: Statistics Denmark, OECD Denmark

The Faroe Islands and Greenland
The Faroe Islands in the North Atlantic and Greenland also belong to Denmark. They have been parts of the Danish Realm since the 18th century. Due to their special status nationally, historically and geographically they have an extensive type of self-government and have assumed legislative and administrative responsibility.

The Danish Economy
The Danish Economy thrives on trade in the EU and Globally.
Denmark’s economic development has been stagnant in recent years. High growth rates in 2004-2007 was followed by negative growth in 2008 and a historical economic downturn by 5.7 per cent in 2009. The Danish economy partially recovered in 2010 and 2011 – followed by a new economic stagnation in 2012 and 2013. GDP increased by 0.4 per cent in 2013.

After 4 years of decrease in employment the trend changed in 2013. Employment increased by 9,000 people (0.3%).

Foreign trade
There was a sharp fall in Denmark’s total exports and imports in 2009 due to the global financial crisis and the subsequent economic slowdown. The foreign trade partially recovered in 2010 and 2011 with growth in exports as well as imports. This recovery slowed down in 2012 and 2013 with only a marginal increase in the foreign trade.
Viewed over a large number of years, external trade has increased considerably and today, makes up a far greater share of valued added than was previously the case.

Denmark’s neighbours are their largest trading partners
Denmark’s largest trading partners are those geographically close to Denmark. Germany is Denmark’s largest trading partner, but in recent years exports to Germany have been declining relatively. Other significant trading partners in the EU are Sweden, Netherlands and the UK.

In 2013, the other 27 EU countries accounted for 66 per cent of the total Danish external trade and Norway another 6 per cent.

The import of goods to Denmark is dominated by oil, goods for consumption and goods for use in the manufacturing industry and other industries

The export of goods from Denmark is dominated by Machinery & Instruments, Pharmaceutical & Medical products and Agriculture/Food products.

1.2 THE SEAFOOD SECTOR

The Basic Conditions for Danish Fisheries are determined by the EU common fisheries policy. Central in this overall framework is the determination of total allowable catches (TAC).

Denmark is the fifth largest exporter of fish and fish products in the world and it is therefore an important industry sector.

There are approx. 3,400 fishing vessels, crewed by approximately 5,400. Small vessels represent the bulk of the fleet (81%), while vessels longer than 24 metres account for less than 3% and represent more than 63% of the total gross tonnage. Around 80% of Danish vessels, that is vessels less than 12 metres, use set gillnets.

There are over 6,500 people employed in the Danish fishing industry as a whole.

The total annual catch value is approximately 3.0 billion DKK. The value of exported fishery products (incl. products based on imported raw material) is 16.5 billion DKK.

The majority of the Danish catch is from the North Sea, followed by the Belt Sea and Liim Fjord.

Fish Processing
In 2013, the total income from the Danish fish processing industry amounted to 2 billion euros. Most of the processing facilities in Denmark are located in northern Jutland close to the major landing sites. The main products are fresh and frozen fillets, smoked, salted and dried fish, as well as preserved and canned fish. The most important group for consumption is preserved/canned fish which accounts for up to 65% of the volume of the total processed products. Another significant part of the Danish fish processing sector is fish meal and fish oil, which accounts for up to 68% of the total volume of industrial fisheries. The processing sector is important to Denmark as it provides a source of jobs in remote fishing communities. Employment in fish processing is about 70% on the total employment in the fishery industry.

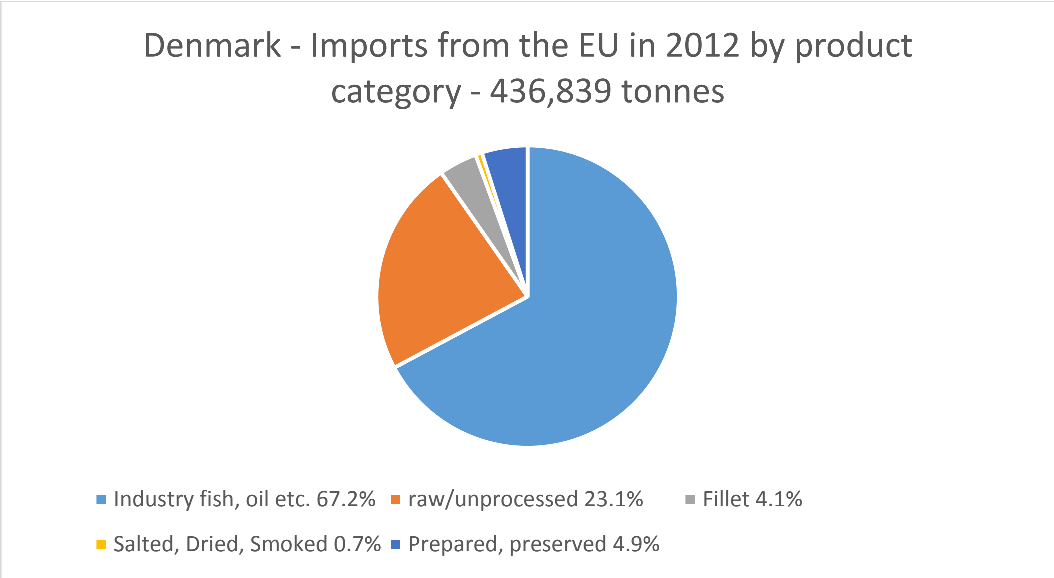
Future
Both fisheries and aquaculture are currently undergoing development in Denmark. The production of fish and shellfish in the aquaculture sector is expected to show increased growth in the coming years.

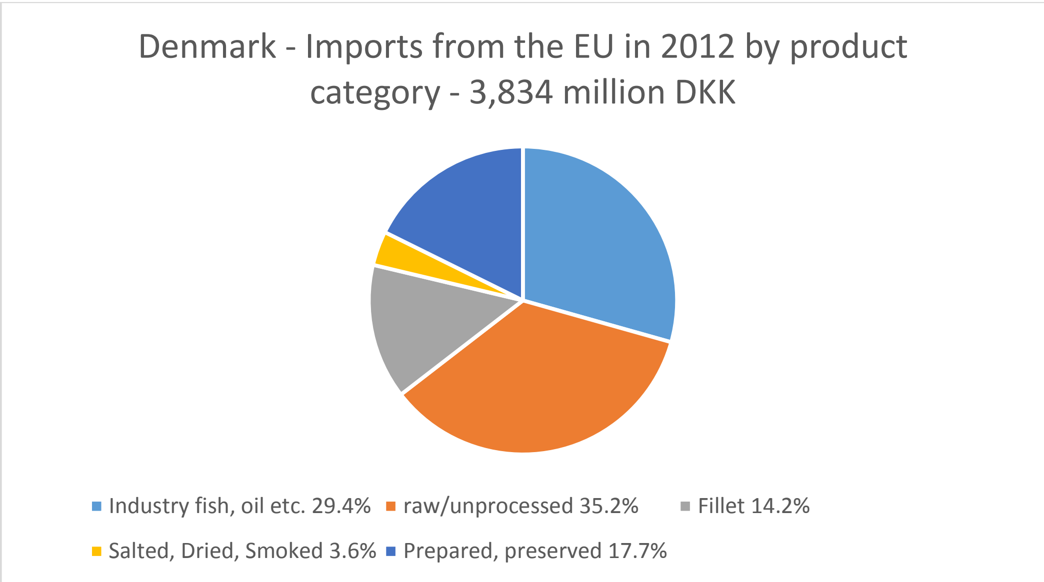
Average Prices at Auction in January 2014.

SPECIES	PRICE PER KILO
Cod	25.75 DKK
Herring	6.39 DKK
Haddock	17.48 DKK
Plaice	10.64 DKK
Saithe	19.25 DKK
Pollack	29.64 DKK
Turbot	86.92 DKK

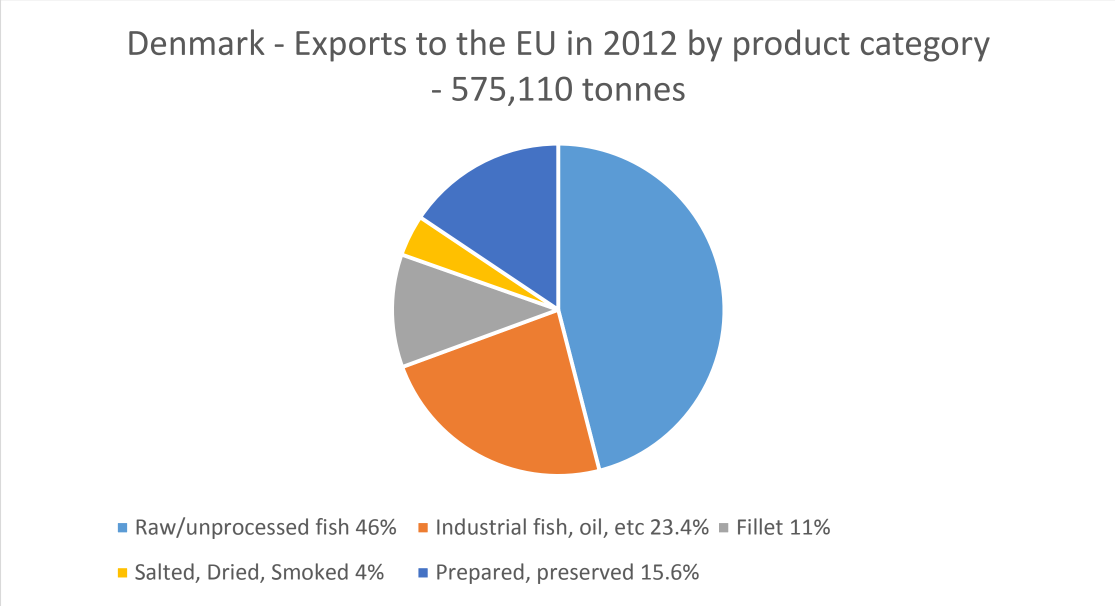
Source: fishbranchen

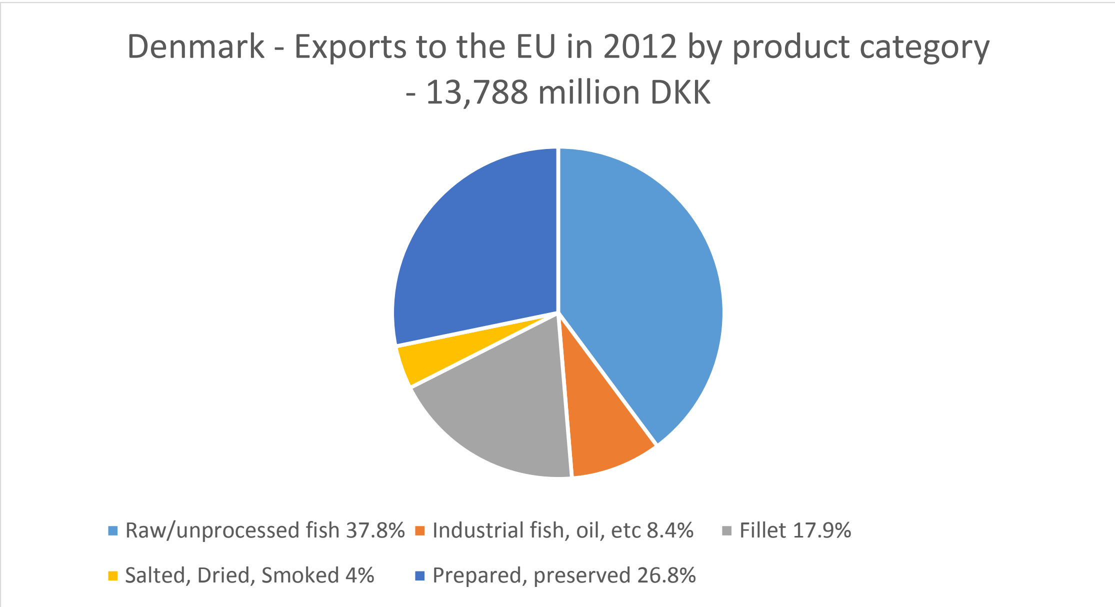
THE TOTAL DANISH IMPORTS FROM THE EU: 436,839 TONNES - 3,834 MILLION DKK.





THE TOTAL DANISH EXPORTS TO THE EU: 575,110 TONNES - 13,788 MILLION DKK.





Danish Fishing Ports

There are 8 main fishing ports in Denmark. Herring, Mackerel, Cod, European Plaice and Mussels are the main types of fish and crustaceans landing in Denmark.

Table: Key Fishing Ports in Denmark and Total Landings in 2011

Fishing Port	Main types of Species	Total Tonnes*	Website
Hanstholm	Saithe,Cod, European Plaice	135,931	www.hanstholmhavn.dk
Skagen	Herring	291,919	www.skagen-havn.dk
Esbjerg	Shrimp, European Plaice, Mussel	2,096	www.portesbjerg.dk
Thyborøn	European Plaice	234,040	www.thyboronport.dk
Hirtshals	Mackerel & Herring	50,130	www.hirtshalshavn.dk
Hvide Sande	European Plaice	52,521	www.hvidesande.dk/havn
Bornholm	Cod	35,936	www.roennehavn.dk
Grenå	Sprat, Herring	33,944	www.port-of-grenaa.com
Other Ports	Blue Mussel, Herring, Cod, European Plaice, Sprat	75,088	N/A
Total		**911,606***	**(*620,524 tonnes for industrial purposes)**

Source: Ministry of Food, Agriculture and Fisheries

Table: 2011 Total Landings of Fish, Crustaceans & Molluscs into Denmark .

Edible fish Value in tonnes/1,000 DKK	Danish vessels		Other EU vessels		Third country vessels		Total landing	Total Value
	Tonnes	1,000 DKK	Tonnes	1,000 DKK	Tonnes	1,000 DKK	**Tonnes**	**1,000 DKK**
Blue Whiting	129	0	3	3	22	11	**154**	**13**
Tusk	48	644	14	183	5	70	**67**	**897**
Whiting	218	1.647	42	417	6	49	**266**	**2.113**
Haddock	2.004	22.269	869	10.621	144	1.732	**3.018**	**34.621**
European Hake	1.967	27.437	403	6.551	176	2.296	**2.546**	**36.284**
Ling	581	8.18	105	1.596	65	906	**750**	**10.682**
Pollack	255	6.622	114	2.927	19	447	**388**	**9.996**
Saithe	5.295	68.502	10.637	124.981	3.141	36.582	**19.073**	**230.065**
Cod	19.187	325.825	3.484	72.726	693	18.222	**23.364**	**416.773**
Other Codfish	1	18	0	4	0	0	**1**	**22**
Greenland Halibut	46	4.245	8	722	3	243	**57**	**5.21**
Common dab	1.543	10.664	455	1.494	13	97	**2.012**	**12.255**
Turbot	651	47.656	68	4.421	3	230	**722**	**52.307**
European Plaice	19.089	198.515	3.455	30.463	206	2.712	**22.751**	**231.691**
Lemon Sole	1.13	42.268	284	9.079	10	430	**1.424**	**51.776**
European Flounder	1.287	6.137	15	34	0	1	**1.302**	**6.172**
Witch Flounder	756	17.205	13	224	9	199	**779**	**17.628**
Brill	245	11.491	36	1.559	1	56	**282**	**13.107**
Common Sole	505	46.232	51	4.403	3	297	**559**	**50.932**
Other Flatfish	22	301	14	212	484	16.535	**519**	**17.048**
Sprat	8.848	18.302	15.462	32.549	.	.	**24.31**	**50.851**
Norway Puot	22	18	.	.	2	1	**24**	**19**
Atlantic Horsemackerel	1	6	.	.	.	.	**1**	**6**
Roundnose Grena	4	23	.	.	1	3	**5**	**26**
European Eel	272	19.562	.	.	.	.	**272**	**19.562**
European Eel, young	84	5.23	.	.	.	.	**84**	**5.23**
Greater Weever	426	1.104	760	1.341	0	0	**1.186**	**2.445**
Catfish	158	5.014	45	1.279	4	155	**208**	**6.448**
Monk	1.088	46.097	99	4.094	48	1.945	**1.235**	**52.136**
Garfish	294	1.679	0	0	.	.	**294**	**1.679**
Lump	225	9.933	24	480	0	13	**250**	**10.427**
Salmon	77	2.687	21	591	.	.	**98**	**3.278**
Mackerel	21.363	260.992	6.908	86.185	24	32	**28.296**	**347.208**
Edible fish Value	**Danish**		**Other**		**Third**		**Total**	**Total**

in tonnes/1,000 DKK	vessels		EU vessels		country vessels		landing	Value
Picked Dogfish/Velletvely	24	344	0	7	1	13	**25**	**364**
Ray	44	877	0	3	0	4	**45**	**884**
Herring	40.673	189.773	46.903	140.427	20.182	118.75	**107.758**	**448.95**
Skate	2	40	.	.	0	1	**2**	**41**
Lumpfish	59	364	0	2	0	0	**59**	**366**
Other Seafish	150	2.772	66	572	5	54	**222**	**3.398**
Freshwater Fish	106	2.352	.	.	.	.	**106**	**2.352**
Blue Mussel	34.443	38.116	.	.	.	.	**34.443**	**38.116**
Other Mussel	794	5.958	.	.	.	.	**794**	**5.958**
North Deepwater Prawn	1.364	50.181	5	63	314	4.428	**1.683**	**54.672**
Common Shrimp	3.01	39.614	1.818	12.36	.	.	**4.828**	**51.974**
Other Shrimps	35	1.969	.	.	.	.	**35**	**1.969**
Norway Lobster	3.575	270.187	66	4.167	2	190	**3.643**	**274.544**
Other Crustacean	270	10.364	13	204	2	35	**284**	**10.603**
Other Mulluscs	850	22.972	8	208	1	36	**860**	**23.217**
Species for industrial purpose	437.14	716.212	137.44	239.46	45.938	96.295	**620.524**	**1.051.968**
Total	**610.37**	**2.568.601**	**229.71**	**796.612**	**71.529**	**303.074**	**911.606**	**3.668.286**

Source: Ministry of Food, Agriculture and Fisheries

1.3 CONSUMER TRENDS IN DENMARK

- In 2014, Singles accounted for 1.5 million households. Food & Drink suppliers have addressed this large target group by changing packaging and portion sizes to accommodate this sector.

- A focus on reducing food waste in the industry, In this connection; consumer discounts for multiple purchases such as 3 for 2 and bulk purchases of fruit and Veg are less prominent in the supermarkets.

- Healthy Food & Drinks, Free From products, Superfoods, Natural and Organic products are continuing growth sectors.

- Nordic food is the new gastronomic trend in Europe and the principles behind Nordic cuisine are in line with the basic principles of organic farming. Denmark has the highest per capita sales of organic food in the world.

- Sustainability, traceability and the origin of products is becoming increasingly important.

- In 2014, there is a drive by some supermarket chains to focus on locally produced food & drink products from smaller suppliers.

A general trend for convenience products and a demand for high availability of products.

- The ‘Food to go’ market is a growing sector with new exciting concepts.
- The supermarkets offer a wider range of fresh finished meals and salads.
- Meal boxes – containing all the ingredients and a recipe – can be ordered online.
- Upmarket food markets with a focus on fresh, quality local produce and new concepts. For example, TorvehallerneKBH is the biggest food market in Copenhagen. www.torvehallernekbh.dk/english.

Consumer Fish Trends:
The Danes are eating significantly more fresh fish than previous years. In 2013, there was sold 1100 tonnes more fresh fish to consumers than in 2012.

This increase started in 2006, when the ‘Eat fish twice a week’ campaign was launch by the Danish Government. The Ministry of Food recommends consumers to eat 350 grams fish a week.

Since this launch, consumption has increased with 1500 tonnes of fish and 800 tonnes of convenience meals with fish. Overall, the turnover of fresh, frozen and tinned fish has increased with 48 million DKK, approximately 1.2%. In general the sale of frozen & tinned fish has fallen, the increase in the overall sector is due to the increased sale of fresh fish.

The increased availability of sustainable and organic fish products has stimulated consumer interest and demand in this area.

There is also greater accessibility to Fresh fish for consumers than previously:

- Supermarkets offer a door-to-door service for fresh fish in addition to fresh fish counters in a number of stores.
- Online fish retailers than deliver daily fish boxes to households.
- Companies supplying fruit and vegetable boxes to households have now expanded into meal boxes including fresh fish and meat options.

Source: fishbranchen.dk

1.4 UK SHARE AND EXPORT OPPORTUNITIES

In 2012, the UK exported 24,102 tonnes of fish and fish products to Denmark worth approximately 377 million DKK. In 2011, there figures were 24,000 tonnes and 405 million DKK. Indicating an overall increase of 102 tonnes of fish & fish products to Denmark, however, the overall value has decreased.

In 2012, the leading species of saltwater fish included Mackerel (8,941), Herring & Pollack and accounts for 11,393 tonnes at a value of 109 million DKK. The leading species of Freshwater fish includes Trout & Salmon and accounts for 2,364 tonnes at a value of 63 million DKK. In addition, Denmark imported 3,522 tonnes of fish oil from the UK at a value of 46 million DDK. This accounts for approximately 20% of all the fish oil imported from the EU to Denmark.

However, this positive UK development is not the same for other EU countries. The total fish imports from the EU to Denmark has decreased in 2012 to 436,839 from 622,341 tonnes in 2011. Sweden accounted for the largest decrease, followed by Germany. In the same period, imports from third countries (outside of the EU) increased by approximately 40 tonnes.

Table: Danish Imports from the UK – Fish & Fish Products in tonnes 2012 including consumption and industrial use.

Category	**Species – Fresh & Frozen**	**UK**	**EU Total**
		Tonnes	Tonnes
Total		**24,102**	**436,839**
Whole saltwater fish	Herring	1256	23,094
	Flatfish	54	1097
	Cod	92	12,921
	Haddock	60	1663
	Pollack	1196	8417
	Other codfish	87	1,379
	Mackerel	8941	11,039
	Other fish	95	26,369
	Total	**11,781**	**85,978**
Freshwater fish	Salmon and trout	2364	10,426
	Eel	1	266
	Other freshwater fish	2	998
	Total	**2367**	**10,426**
Molluscs and Crustaceans	Lobster and Norway lobster	121	576
	Shrimps	355	1,673
	Other Crustaceans	5	86
	Mussels	65	550
	Other Molluscs	1	524
	Total	**547**	**3,409**

Category	Species – Fresh & Frozen	UK	EU Total
Industrial Fish	**Total**	**2,264**	**209,391**
Fillet	Mackerel	410	761
	Salmon and trout	259	3010
	Other	354	13,955
	Total	**1,025**	**17,726**
Salted, dried, smoked	Herring	3	31
	Salmon & Trout	18	1,771
	Cod	3	13
	Other	10	1,436
	Total	**34**	**3,251**
Prepared or Preserved	Mackerel	210	2,921
	Shrimps	409	2,069
	Sardine	90	150
	Fillet	33	5,521
	Ready-prepared dishes etc.	18	2,807
	Other fish commodities	1414	6,911
	Other Molluscs and Crustaceans	39	944
	Total	**2,213**	**21,323**
Fishmeal, oil etc.	Fishmeal	336	65,287
	Fish oil	3,522	18,506
	Fish-liveroil	11	272
	Solubles	2	5
	Total	**3,872**	**84,070**
TOTAL TONNES		**24,102**	**436,839**

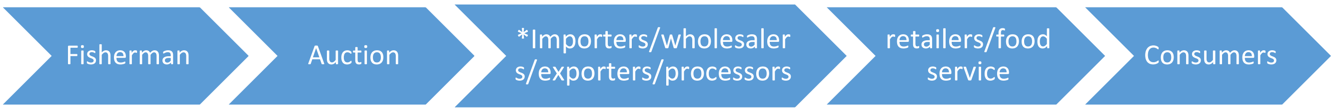
SECTION 2 – DOING BUSINESS PROFILE

2.1 THE SUPPLY STRUCTURE IN DENMARK

Denmark is among the major exporters of fish and seafood products worldwide. The fish and seafood are used for a variety of products ranging from fishmeal for industrial use to fish products for human consumption. The supply chain in the Danish Fisheries Sector is diverse and includes the fishermen, agents, exporters, wholesalers, importers, retailers and traders.

Intermediate and final products are produced by processors and sold onto the foodservice and retailers. Wholesalers often represent a number of clients at fish auctions. Retailers and caterers make up the final step in the supply chains – selling products to the consumers.

A simple Danish supply chain is illustrated below.



*Importers/wholesalers/exporters and processors could also buy directly from international suppliers.

The top 3 fish processors/producers in Denmark are Royal Greenland (41% market share), A. Espersen A/S (10% market share) and Polar Seafood (12% market share). There are approximately 40 processors/producers in Denmark,

The Key Processors of fish products with headquarters in Denmark

Company Name	**Royal Greenland A/S**
Website	www.royalgreenland.com
Company description	Royal Greenland is the world's largest supplier of cold water prawns and among the top ten seafood producers. The have production facilities in a number of countries. Royal Greenland caters to all customer segments with their own brand and as a supplier for private labels. Their customers include retailers and food service professionals in a variety of sectors. Company Turnover: 5.3 Billion DKK.

Company Name	**A. Espersen A/S**
Website	www.espersen.dk
Company description	Espersen is a world leader in the processing of frozen fish blocks, frozen fillets, specials cuts, and breaded and deluxe puff pastry fish products. They have modern production plants and non-production units in Denmark, France, Lithuania, Poland, Russia and Spain as well as in China, Hong Kong and Vietnam. The company took over the Danish company Rahbekfisk. The company now has 1600 employees and a turnover of 2 billion DKK.

Company Name	**Polar Seafood**
Website	www.polarseafood.dk
Company description	Polar Seafood is one of Scandinavia's leading suppliers of a wide range of seafood ideally suited to processors, wholesalers, caterers and retail customers. Their head office is in Greenland.

Other Key importers, exporters and processors.

Please note this is only a sample list.

Company Name	**Nordic Seafood**
Website	www.nordicseafood.com
Company description	The company is an established leading importer, distributor and processor of frozen fish and shellfish from suppliers worldwide. Company Turnover: 2.2 billion DKK.

Company Name	**Jeka Group A/S**
Website	www.jekafish.dk
Company description	The Jeka Group is an international company engaged in production, sales and distribution of seafood. The group consists of 2 companies: Jeka Fish & Cimbric A/S. Company Turnover: 282 million DKK.

Company Name	**Sirena A/S**
Website	www.sirena.dk
Company description	Sirena A/S is a leading Scandinavian supplier of fish products and the largest exporter of cold-water shrimps. Company Turnover: 1.37 Billion Dkk.

Company Name	**Kangamiut Seafood A/S**
Website	www.kangamiut.dk
Company description	The company is a large seafood exporter with subsidiaries in a number of European countries. They offer a wide range of frozen fish and also produce and distribute finished products in cooperation with affiliated companies. Kangamiut Holding A/S owns a number of seafood companies including Kangamiut Seafish A/S. Company turnover: 765 million DKK.

Company Name	**Alimex Seafood A/S**
Website	www.alimex.dk
Company description	Alimex Seafood A/S is an established production company. Trading whitefish, in particular cod, Alaska pollock and saithe is a key activity. They source products and raw materials through from suppliers worldwide. They also own Boco Seafood and are part of the Kangamiut Holding. Company Turnover: 575 million DKK

Company Name	**Brdr Schlie's Fiskeeport A/S**
Website	www.brdr-schlie.dk
Company description	The company is a leading importer/exporter and processor of fish. The company is expanding their business in the coming year. Company turnover: 500 million DKK.

Company Name	**Bjerrefisk a/s**
Website	www.bjerrefisk.dk
Company description	The company is an established importer and processor of fish. They supply the food service, restaurants, hotels and cruise ships.

Company Name	**Ekko Fisk A/S**
Website	www.ekkofisk.com
Company description	Ekko Fish is an established producer of frozen and salted fish products. Fish is purchased at Fish auctions and also imported directly.

2.2 THE RETAIL CHANNELS IN DENMARK

Fish is purchased by consumers through independent fishmongers, supermarkets and online stores. The independent fishmongers employ 1000 people and have a turnover of 1 billion DKK. They are approximately 80 fishmongers in Denmark.

In recent years, there are fewer small grocery shops and more discount chains. The change in the rules regarding opening hours in 2012 has resulted in all stores having the opportunity to open on Sundays.

In 2013, there were a total number of 3040 grocery stores in Denmark including 1558 discount stores. In 2013, 67 new discount shops opened and this sector is continuing to grow. The total turnover in the grocery sector was 110.7 billion DKK and discount stores accounted for almost 40% of this.

There are 4 dominating players in the retail sector Coop, Dansk Supermarked, Dagrofa, Reitan distribution. Smaller international players include Aldi & Lidl with a combined market share of 5.4% and 324 stores (Aldi 232 + Lidl 92 stores)

Company Name	**Coop Danmark A/S**
Website	www.coop.dk
Company description	Coop has a 37.6 % market share of the Danish Retail sector (supermarkets) and a group turnover of 45 billion DKK. The group operates the following supermarket chains: • Kvickley – 78 stores and 8.7% • SuperBrugsen – 228 stores and 11.8% • Dagli Brugsen – 356 stores and 5% • Lokal Brugsen – 20 stores and 0.2% • Irma – 82 stores and 2.2% • Fakta: 432 Stores and 9.8%.

Company Name	**Dansk Supermarked**
Website	www.dsm.dk
Company description	Dansk Supermarked has a 31.9 % market share and a group turnover of 55 billion DKK. The group operates the following supermarket chains: • Netto - 450 Stores and 14.4% • Fotex – 88 stores and 11.4% • Bilka – 17 stores and 6% • Salling – 2 stores and 0.2%

Company Name	**Dagrofa (Supergros)**
Website	www.dagrofa.dk
Company description	Dagrofa is the 3rd largest player in the Danish Grocery Sector with a market share of 15.6%. The group operates the following supermarket chains: • Superbest – 95 stores and 5.5% • Eurospar – 99 stores and 3% • Spar – 118 stores and 19% • Min kobmand – 190 stores and 1.8% • Kiwi - 101 stores and 1.7% • Kiwi/spar – 53 stores and 0.3% Norges Gruppen (Norway) is now the majority shareholder in Dagrofa. The Meny Chain will take over the Superbest and Spar chains in 2014/15.

Company Name	**Reitan**
Website	www.reitan.dk
Company description	Reitan has a market share of 9.1%. The group operates the following supermarket chains: • Rema 1000 – 249 stores and 7.9% • Lovbjerg – 16 stores and 1% • Other – 7 stores and 0.1%

2.3 THE FOODSERVICE CHANNELS IN DENMARK

During recent years the food service sector in Denmark has experienced consolidation with a number of the larger companies taking over the small players. There are 3 dominating companies; Dansk Cater, Catering Engros and Hørkram Food service.

The companies supply a full product range including fresh and frozen products. They deliver directly to their customers with their own lorries and also have Cash & Carry outlets. Their customers represent a broad range of sectors including fast food, restaurants, canteens, hospitals, hotels, café's, pubs and other public and private institutions.

A number of both local and international manufacturers supply the companies directly.

The 3 largest players offer a similar product range, varying the service offering provide a platform for differentiation. For example; Catering Engros has invested in smart e-solutions for their customers.

This consolidation is still continuing, Metro Cash & Carry will close its operations in Denmark in 2014. It has 5 cash & carry stores in Denmark. Dansk Cater will purchase 2 of these stores and expand their Inco Cash & Carry chain.

Company Name	**Dansk Cater**
Website	www.danskcater.dk
Company description	Dansk Cater is the Holding company for 16 independent Foodservice wholesalers in Denmark including BC Catering and Inco Cash & Carry. Dansk Cater's companies are located throughout Denmark. Each company has its own local profile when it comes to product assortment and distribution requirements. All companies are owned 100% by Dansk Cater. The Group employs approximately 1500 people in Denmark.

Company Name	**Hørkram Foodservice A/S**
Website	www.hoka.dk
Company description	Hørkram Foodservice A/S is a total supplier to the food service sector and is one of the top 3 largest in Denmark. The company distributes a wide product range all over Denmark. They employ 575 people.

Company Name	**Catering Engros/Dagrofa**
Website	www.cateringengros.dk www.dagrofa.dk
Company description	Catering Engros is one of Denmark's largest foodservice wholesalers. They have 6 warehouses and 2 cash & Carry outlets. Catering Engros A/S is part of Foodservice Danmark. Dagrofa owns Foodservice Danmark. Dagrofa is a leading player, they own Denmark's largest Cash & Carry chains with 30 stores in Denmark. Dagrofa also own supermarket chains, a wholesaler to the retailers (Supergros) and foodservice (Catering Engros).

2.4 KEY REGULATIONS

Regulations and The Fisheries Policy

The Danish Ministry of Food, Agriculture and Fisheries aims to create flexible conditions for the fishing industry and to reduce administrative burdens on the basis of sustainability. Fishery in Denmark is regulated partly through the EU Common Fisheries Policy and partly through national political initiatives and legislation.

In the reform of the Common Fisheries Policy that the Council of Ministers and the European Parliament agreed on in May 2013, it has therefore been decided gradually to introduce a ban on discard of fish from 2015 and onwards.

Both fish and fishers are moving across borders. This is why the fisheries policy is a common concern in the EU. The basis of the fisheries policy is free and equal access to fishing in EU waters, in international waters and in the waters of third countries, where the EU has entered into agreements.

Quota

The European Union's common fisheries policy (CFP) forms the basic framework of Danish fisheries. An important component of the common fisheries policy is the system of preservation and effective utilization of the biological resources of the sea, through regulation of catches by fixed quotas. For the North Sea, the Skagerrak and the Kattegat, there are quotas of by-catches for herring that are landed with other fish and which are not intended for human consumption.

The total allowable catch (TAC)/quota regulation administers the fishery on the fish stock which are autonomous to the EU and on the joint stocks managed by the EU together with certain third countries. For the Danish fisheries this is mainly Norway, Greenland and the Faroe Islands. A supplementary set of Regulations, based on the Agreed Records of the consultations with third countries, allocates to the Member states the catch opportunities in the third country fishing zones.

Regulations and common practices

In Denmark, it is prohibited for non-commercial fishermen to market their own catches. They have to register with The Danish Agrifish Agency. The agency registers all Danish and foreign landings from fishing vessels in Danish ports together with landings from Danish vessels in foreign ports.

The landed fish is sold directly to the purchaser, handed over to a fish collecting agency or presented on the fish auction by the fisherman himself.

The prices obtained from the sales notes are exclusive of VAT. Landing costs and import duties (if applicable) are also excluded. However, this is not standard practice in Bornholm – where it is common to allow the purchaser of the fish to cover some of the landing costs: thus sales prices tending to be lower in this area.

For Danish landings abroad the prices are converted into Danish Kroner using the exchange rate of the day.

General Food Labelling Requirements

Please find below the general rules for food labelling. The labels should be in Danish or another language close to Danish – for example Swedish and the label should be clearly marked on the product (if packaged).

Packaged Products

- Origin and Producer or wholesaler.
- Product description
- Ingredients including allergens and amounts.
- Netto weight
- Use by date

Non-Packaged Products

- As a starting point – no labelling requirements

Specific Labelling Requirements for fish

In addition to the general rules, the following additional EU rules are required for the labelling of fish (including packaged fish):

- Product description (species) and official name
- Production method and packaging date. For example; minced fish should be labelled with the date and time it was processed.
- Catch area for products caught at sea and country of Origin for freshwater fish
- The maximum storage temperature.
- If the product has been previously frozen this should be marked clearly.
- Name of manufacturer, packer or EU seller (except for non-packed fresh produce)

There are some variations depending on if the fish is sold fresh and not packaged.

VAT Rates

VAT is paid on all Food & Drink products at a rate of 25%. There are no import tariffs as Denmark is a member of the EU**.**

Organic farming

The EU ruling on Organic fish farming replaced the Danish ruling on 1 July 2010. Only farm bred fish can be certified organic. You can buy the following organic fish in Denmark: Salmon, Trout & Cod.

Sustainability

The MSC fisheries standard is designed to assess if a fishery is well managed and sustainable. The certification is a global certification and only seafood from an MSC certified fishery can carry the eco-label.

These Danish caught fish have the MSC label:

- Plaice from the North Sea
- Cod from the Baltic Sea
- Saithe from the North Sea and the Skagen channel
- Herring from the North Sea and the Norwegian Sea
- Mussels from Lim Fjord
- Dove Sole from the North Sea
- Haddock

In September 2014, the first MSC certification was awarded to a Danish Fish retailer.

2.5 ASSOCIATIONS, PUBLIC ORGANISATIONS AND USEFUL LINKS

Name	**The Ministry of Food, Agriculture and Fisheries**
Website	www.fvm.dk
Company description	The aim of the Ministry is to provide the framework for the development and growth of food producing sector.

Company Name	**The Danish Agrifish Agency**
Website	www.agrifish.dk
Company description	The Danish AgriFish Agency is an agency under the Ministry of Food, Agriculture and Fisheries. It is responsible for ensuring the optimal conditions for plants, fisheries and agriculture.

Company Name	**The Danish Seafood Organisation**
Website	www.danishseafood.org
Company description	The organisation was formed to strengthen the industry's position both domestically and internationally. There is an extensive members list available on their website.

Company Name	**Fisk Handlerne Forening**
Website	www.fiskehandlerne.dk
Company description	A branch organisation for the independent fish shops in Denmark. There are 1000 members with a turnover of 1 billion DKK.

Company Name	**Fiske Branchen**
Website	www.fiskebranchen.dk
Company description	A branch organisation supporting and administering the Eat more fish campaigns to the consumers and industry.

Company Name	**Danmarks Fiskeriforening Producent Organisation**
Website	www.fiskeriforening.dk/
Company description	The Danish Fisherman's Association is a branch organisation for the Danish Fishermen.

Name	**Fiskeritidende**
Website	http://fiskeritidende.dk/
Company description	A fisheries newspaper produced by the Danish Fisherman's Association.

Name	**Dan Fisk International Exhibition**
Website	www.danfish.org
Company description	DanFish International is one of the world's most important exhibitions for equipment and services for the fisheries industry. DanFish International, which will be held for the 24th time in 2015, is an international forum, where producers and other suppliers to the fisheries sector have an outstanding opportunity to make contact with customers from all over the world.

UK Trade
& Investment

UKTI CONTACT

Report Prepared by	
Name:	Joanne Ganthier
Job Title:	Market Advisor
Location:	Denmark
Email:	Joanne.Ganthier@mobile.ukti.gov.uk

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