

TEA IN DENMARK

10 Apr 2015

HEADLINES

- Tea grows by 5% in retail volume terms and reaches sales of DKK394 million in 2014
- Tea experiences a second year of healthy growth in a row
- Danes prefer to drink tea at home, as on-trade volume sales increase by only 1% in 2014
- Pickwick remains the most popular tea brand in 2014 with a value share of 27%
- Tea is expected to record a CAGR of 2% in total volume terms during the forecast period

Market Size Tea - Denmark 2009 - 2014

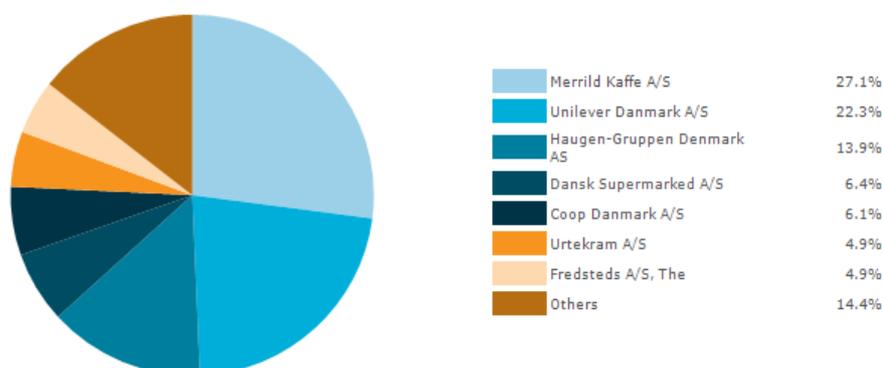


Source: Passport by Euromonitor International

COMPETITIVE LANDSCAPE

- Merrild Kaffe A/S is the leader in the tea category, and held a value share of 27% in 2014. Its most popular product is Pickwick, which can be found in different tea categories such as tea bags black standard, tea bags black speciality, loose black speciality tea, loose black standard tea, green tea and fruit/herbal tea. The brand has been available for a long time in Denmark and has strong consumer loyalty. Its products are considered as being of a high quality, are easy to use, are available in most retail chains in Denmark and are advertised strongly with different marketing campaigns. They are, however, mainstream products and consumers who seek to try more exclusive tea do not buy this tea brand often.
- Twinings sold by Haugen-Gruppen Denmark AS showed the best performance in 2014 and increased its value share by one percentage point. Twinings is a premium tea brand with a long tradition and is perceived as being of good quality. It is available in many formats but it is strongest in black tea, where it held a 16% retail value share in 2014. Its Earl Grey tea is especially favoured by black tea fans in Denmark.

Company Shares (by National Brand Owner) Tea - Denmark - Retail Value RSP - % 2014



Source: Passport by Euromonitor International

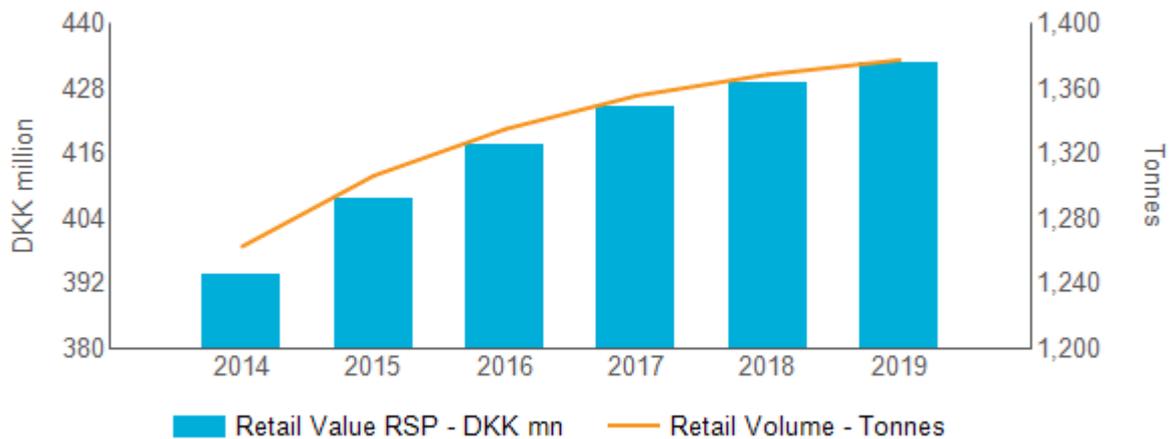
NATIONAL BRAND OWNERS AND THEIR BRANDS

Company Name (NBO)	Brand (GBO)
Aldi Marked AS	Aldi (Private Label)
Coop Danmark A/S	Ånglamark (Private Label), Coop (Private Label), Irma (Private Label), X-Tra (Private Label)
Dansk Supermarked A/S	House of Tea (Private Label), Princip! (Private Label)
Fredsteds A/S, The	Fredsteds (Fredsteds A/S, The)
Haugen-Gruppen Denmark AS	Twinings (Associated British Foods Plc)
Kompagniet A/S, The	Frugt The (Kompagniet A/S, The)
Lidl Danmark K/S	Lord Nelson (Private Label)
Merrild Kaffe A/S	Pickwick (DE Master Blenders 1753 NV)
Natur Drogeriet A/S	Ægte Venustorn Te (Natur Drogeriet A/S), Førdøjelse The (Natur-Drogeriet A/S), Halslindrende The (Natur Drogeriet A/S), New Body The (Natur Drogeriet A/S)
Spar Denmark A/S	Spar (Private Label)
Unilever Danmark A/S	Carøe (Unilever Group), Lipton (Unilever Group), Lipton Yellow Label (Unilever Group), Medova (Unilever Group)
Urtekram A/S	Urtekram (Urtekram A/S), Yogi (East West Tea Co LLC)
Urteteket ApS	Urte (Whole Co A/S, The)

Source: Passport by Euromonitor International

FORECAST

Market Size Tea - Denmark 2014 - 2019



Source: Passport by Euromonitor International

DEFINITIONS AND METHODOLOGY

Tea

This is the aggregation of Black Tea, Fruit/Herbal Tea, Green Tea, Instant Tea, and Other Tea.

Methodology

This report is derived from Euromonitor International's Passport information system. Industry research is carried out by a global team of more than 600 in-country analysts and is based on a core set of research techniques:

- National-level desk research, company research and analysis, store checking, trade interviewing with national players and market analysis
- International-level desk research, multinational company research and analysis, trade interviewing with international players and market analysis