

CASE STUDY

Flying Tiger Copenhagen



Flying Tiger Copenhagen is a design-led European retail brand integrating circular economy principles into international growth.

flying tiger
copenhagen

The company combines physical retail expansion with digital customer engagement, supported by integrated supply chain operations in Europe, Asia and the Middle East.

- ▶ Revenue: €700 million (DKK 5.2 billion) in 2024
- ▶ 1,001 stores across 39 countries
- ▶ Thousands of employees across Europe, Asia and the Middle East and North Africa
- ▶ Growing omnichannel presence
- ▶ Flying Tiger Copenhagen Club app launched in 2024

Flying Tiger Copenhagen's track record



Flying Tiger Copenhagen's strategy has delivered measurable environmental and financial results.

Circular design and decarbonisation strategy

Flying Tiger Copenhagen frames climate action as both the right thing to do and a source of long-term competitive advantage. Rather than treating sustainability as compliance, the company integrates circularity into product design, logistics and customer engagement.

Science-based targets

The company has adopted Science Based Targets initiative validated emissions reduction goals covering Scope 1, 2 and 3 emissions. These targets guide procurement, logistics strategy and product development decisions.

Circular product design

Circularity is embedded at the design stage. Key measures include:

- ▶ Reduced plastic use
- ▶ Increased renewable and recycled materials
- ▶ Simplified and recyclable packaging

By addressing materials early in the design process, the company reduces both environmental footprint and long-term cost exposure.

Low-carbon logistics

Flying Tiger Copenhagen has shifted part of its sea freight to eco-fuels through an ECO Delivery Agreement with Maersk. This reduces global supply chain emissions while maintaining supply reliability and cost predictability.

Digital customer engagement

The Flying Tiger Copenhagen Club app strengthens the circular strategy by:

- ▶ Connecting physical and online customers
- ▶ Promoting circular product lines
- ▶ Supporting customer loyalty
- ▶ Improving demand forecasting

Digital integration enhances both sustainability outcomes and commercial performance.



Supplier engagement

Enhanced supplier scorecards evaluate sustainability performance across the value chain, including:

- ▶ Material sourcing
- ▶ Social responsibility
- ▶ Environmental compliance

These frameworks improve transparency and reduce long-term supply chain risk.

Performance highlight

2024 revenue:
€700 million

EBITDA margin:
21.6%

Emissions intensity reduction since 2019:
23%

This combination of environmental improvement, margin resilience and international expansion underpins the company's positioning as a circular retail leader.

The retail sector in transition

European retail is navigating rising logistics costs, supply chain volatility, margin pressure and increasing environmental regulation. At the same time, consumers expect affordability alongside sustainability and transparency.

For value-oriented retailers, the challenge is clear: decarbonise and modernise without eroding competitiveness.

Flying Tiger Copenhagen demonstrates how circular design and low-carbon logistics can strengthen growth, operational resilience and brand differentiation simultaneously.

Demonstration in action

Circular design driving growth

Flying Tiger Copenhagen integrates circular messaging directly into the customer experience.

Campaigns combine:

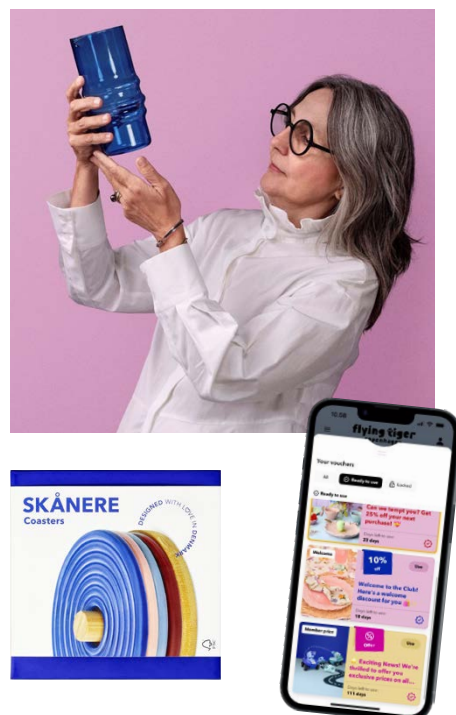
- ▶ Highlighted circular product lines
- ▶ In-store communication
- ▶ App-based loyalty incentives
- ▶ Digital education on responsible consumption

This integration strengthens brand differentiation and repeat purchasing.

Cost effectiveness of circular retail

Industry narratives often assume that sustainability reduces margins. Flying Tiger Copenhagen's performance challenges this assumption. By reducing material intensity and improving logistics efficiency, the company has:

- ▶ Lowered exposure to fuel volatility
- ▶ Reduced compliance risk
- ▶ Improved operational efficiency
- ▶ Strengthened pricing power



Circular design is not treated as a green premium strategy but as an operational efficiency pathway.



Enabling conditions

Policy and market environment

The EU Green Deal and national circular economy frameworks have provided regulatory certainty, enabling long-term investment decisions. Flying Tiger is supportive of ambitious climate rules to ensure an even playing field, to reward front runners and innovators.

Growing consumer demand for sustainable products has created additional market pull.

Partnerships

Strategic partnerships have accelerated implementation:

- ▶ Maersk for low-carbon freight solutions
- ▶ Strong franchise partners supporting expansion in Türkiye, Vietnam and Australia

These partnerships enabled lower-carbon scaling into new markets.



Why this matters for Europe's competitiveness

Flying Tiger Copenhagen demonstrates that:

- ▶ Circular design can reduce emissions intensity while supporting growth
- ▶ Low-carbon logistics improves resilience against energy price shocks
- ▶ Stable regulatory frameworks enable investment certainty
- ▶ Digital engagement enhances both sustainability and sales performance



The company's experience reinforces a broader lesson: climate strategy can function as both a growth strategy and a resilience strategy.

Looking ahead

Flying Tiger Copenhagen has set a target of a 30% reduction in emissions intensity by 2026 compared with 2019. Next steps include:

- ▶ Scaling circular product ranges
- ▶ Expanding digital engagement through the Club app
- ▶ Strengthening supplier sustainability performance
- ▶ Continuing international expansion in high-growth markets

Expansion in Türkiye, Vietnam and Australia demonstrates that the model is scalable across diverse markets.

Rapid and practical retail decarbonisation

Flying Tiger Copenhagen's approach shows that emissions reductions in retail do not require disruptive or high-cost technological shifts. Instead, circular design, low-carbon logistics and digital engagement provide near-term, commercially viable pathways.

With stable regulation that helps internalise the costs of externalities and continued consumer demand, European retailers can scale similar models rapidly while strengthening resilience and growth.

Key takeaways



Circular product design can reduce emissions and material risk without undermining affordability.



Low-carbon freight solutions are commercially deployable at scale.



Digital tools amplify sustainability impact and customer loyalty.



Clear long-term policy frameworks support business investment.



Climate action, when integrated into core operations, strengthens competitiveness.

This case study forms part of the Environmental Defense Fund Europe's broader work with businesses to identify and scale cost-effective pathways for industrial decarbonisation.



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