



**BUSINESS
FINLAND**

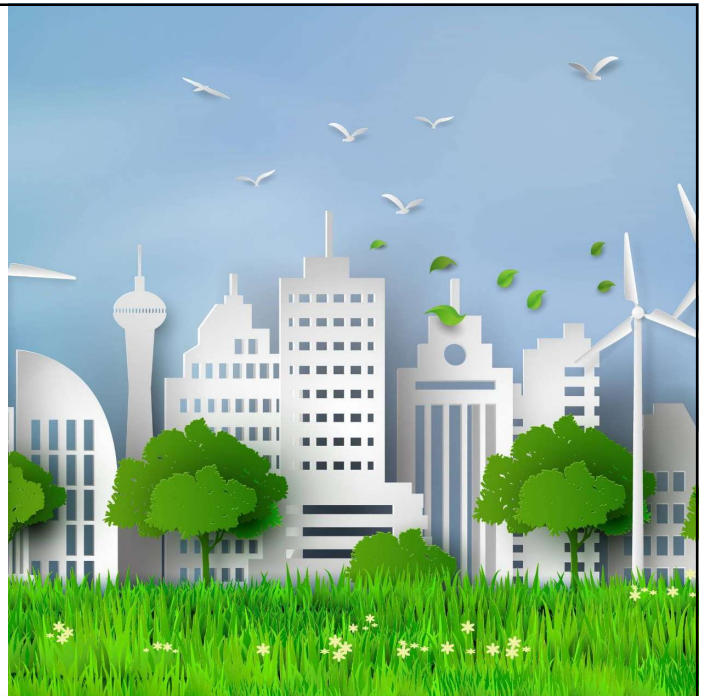
**DENMARK
DYNAMIC NEAR MARKET –
EXCELLENT TEST-BED**

26.11.2018

GENERAL MARKET OUTLOOK



- Inflation 2017: 1.1%
- GDP real growth in 2017: 2.1%
- GDP: 2 059 b DKK, 276 b EUR
- Denmark's economy will see slower gains than most of its neighbors in 2018. Real GDP is expected to grow by 1.6% in 2018 and by 1.8% in 2019
- The labor market is performing well, Unemployment (2017) 5.7%
- Total exports 2017: 1049,2 million EUR
- Total imports 2017: 1637, 8 million EUR



STAFF



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GOL Health & Wellbeing, Developing Markets GP



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Consumer, Food, Maritime, ICT & Digitalization



+ Edufi Trainee
Current: Laura Tikkanen



Lars Hagebris, Senior Advisor

Invest in Finland activities regarding Denmark
Based in Stockholm



KEY ACTIVITIES

Export Finland
(Invest in Finland)



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MOST REQUESTED SERVICES

- Advice
- Opening doors and networks
- Introduction to local consultants
- General market info and introduction



BUSINESS FINLAND PROGRAMS & CAMPAIGNS 2019

Status in November 2018.
There may be changes to
the names.

BIO AND CIRCULAR

- Food from Finland
- Bio and Circular Finland

CLEANTECH

- Smart Energy Finland
- *Batteries from Finland*
- *Sampo Produced in Finland*

DIGITALIZATION

- Connectivity and Intelligent Industry Finland
- New Space Economy Finland
- Smart Mobility Finland
- Digital Trust Finland

HEALTH AND WELLBEING

- Personalized Health Finland
- Smart Life Finland

CONSUMER

- *Smart Finance*

TRAVEL

- Visit Finland



- AI Business Finland
- BEAM – Business with Impact
- *Talent Boost/Work in Finland*
- *Sports Cluster Finland*

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Legend: Program in progress, Campaign in progress, program or campaign under planning

SAMPO Produced in Finland Campaign



- The campaign is targeted to companies of all sizes at manufacturing industry
- aims to strengthen the innovation and production of the industry as well as new investments in Finnish companies.
- Event in Iisalmi 12.12.
- <https://www.businessfinland.fi/ajankohtaista/tapahtumat/2018/sampo-paja/>

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KEY INDUSTRIES

HEALTHCARE

- Hospital buildings, 5.4 billion € being invested
- National dementia action plan – 63.2 million €
- Making e-health work – National level strategy
- Elderly medical patient ca. 40 milj. EUR annually

CONSTRUCTION

- Hospital buildings ca. 6 bn Eur
- School renovations 134M€ and campus building 524M€
- Road and Railway building and renovations 6,4bn€
- Smart city initiatives

FOOD

- Demand for high-quality food and beverage products, free-from, vegetarian and organic products and ingredients
- Agriculture machinery, consultation

CLEANTECH

- Denmark's plan to be CO2 neutral by 2050 creates many business opportunities in this sector

UN PROCUREMENT

- CPH one of the global hubs for UN organizations
- Closest procurement location to Finland
- UN organizations buy goods and services worth nearly 18 bn USD annually (20-40% goes through CPH)

ICT

- Europe's most digital nation
- Digitalization plan 2016-2020
- Shortage of 3000 IT engineers – estimated shortage of 19000 in 2030

MARITIME

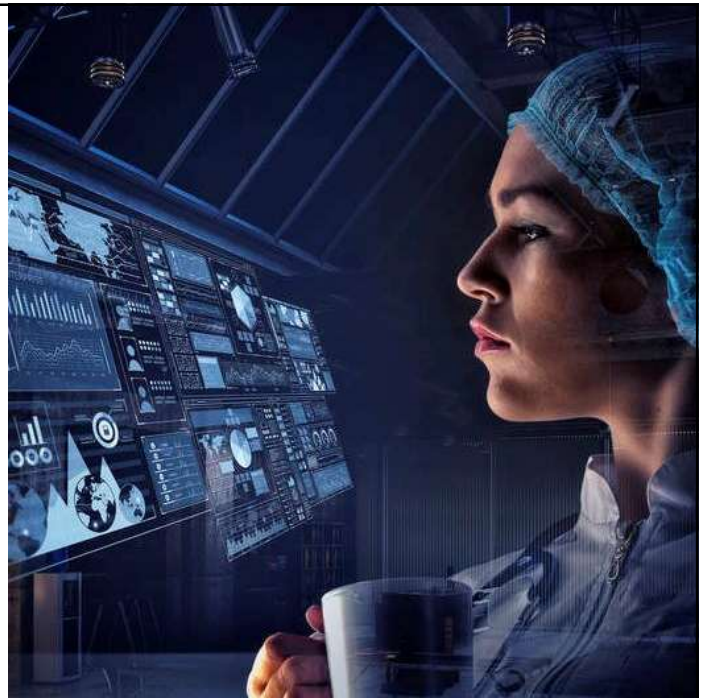
- Big Maritime cluster
- World's 8th biggest fleet
- Energy efficiency and safety highly relevant at the moment



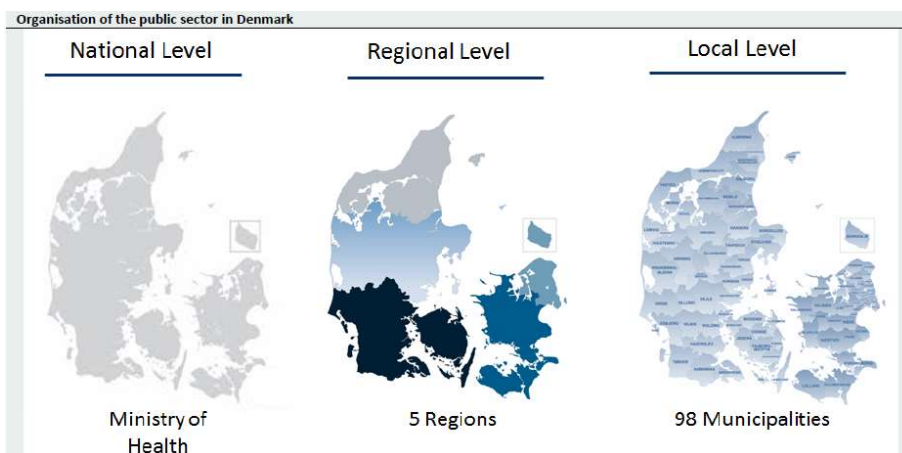
HEALTH AND WELLBEING

HEALTHCARE IN DENMARK FACTS

- Universal healthcare system with equal access for all citizens
 - Services mainly financed by general taxes
 - Most health care services are free of charge for citizens of Denmark
 - High degree of digitalization and utilization of health technology solutions
 - Focus on patient centric approach
-



HEALTHCARE SYSTEM



The State, The Ministry of Health

- National health policies
- Legislation on health care
- Guidelines for general planning
- Operation of the health care service

5 regions

All hospital (incl. emergency care) and psychiatric treatment

- Parts of the primary healthcare system:
 - General practitioners (family doctors), Private practicing specialists, Dental services for adults, Physiotherapy

98 municipalities

- Home nursing and homes for elderly people
- Public and school health care
- Child dental treatment
- General disease prevention
- Rehabilitation

ELDERLY MEDICAL PATIENT

The elderly medical patient often suffers from severe disease, several simultaneous diseases and/or impaired functional abilities.

- Almost 50% of the patients on medical wards are over 65 years
- Most common diseases are dementia and COPD

In the Finance Act for 2016, the Danish government has prioritised an annual allocation of EUR 40.2 million to a new national action plan for the elderly medical patient.

- Plan focuses primarily on efforts before and after hospitalization and on increased coherence across sectors
- Improves the ability of the municipalities to detect early signs of disease, loss of functional ability etc. in order to prevent unnecessary hospitalization of elderly people

NEW SUPER HOSPITALS

The five regions
have invested more than
.4 b DKK (5,56 b EUR)
preparing their hospitals
for future demands
20% on technology

The hospitals are
scheduled to be
ready by
2020-2022

5 new national
superhospitals are being
built and **11** existing
hospitals are being
renovated

More information regarding the status of different projects
can be found here:
<http://www.godtsygehusbyggeri.dk/maal-og-styring/english>

NEW HOSPITALS & FUTURE OF CARE

- Improved efficiency
- Hospital logistics
- Flexible hospital
- Emergency service
- Hospital stay shortens
- More out-patients
- Tele-health
- Technology



- White paper on Hospital Logistics: <https://www.healthcaredenmark.dk/media/1461454/HCD-Hospital-Logistics-white-paper-v1-single-0217.pdf>

BØRNERIGET





FOOD

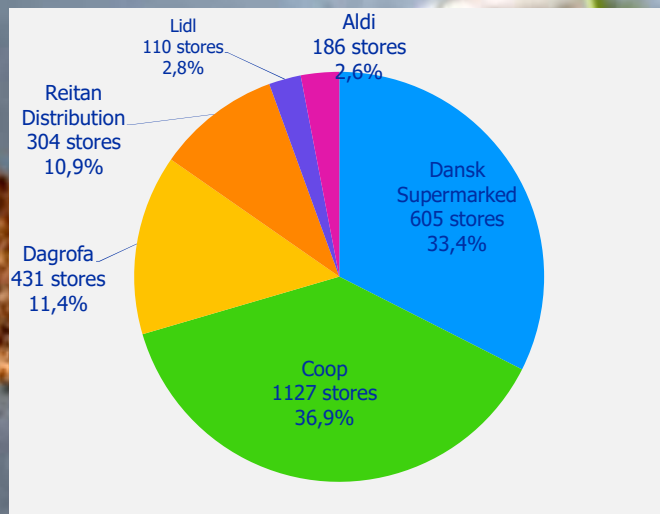
Favorable economic terms, high living standards and Danes' confidence about the future have supported growth in the overall consumer food service

- Increased interest premium and free from food products
- Consumers value natural ingredients to a larger extent
- Vegetarian and vegan products is expected to become one of the biggest trends in food market in 2019
- Food of high quality that is healthy, tasty and convenient to prepare is still relevant in a hectic lifestyle among the working population

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MARKET SHARE OF DANISH SUPERMARKET CHAINS



Dansk Supermarked

Føtex - 99
 Bilka - 17
 Netto - 489

Lidl

Aldi

Coop Danmark

Kvickly - 76
 SuperBrugsen - 229
 Dagli'Brugsen - 299
 LokalBrugsen - 38
 Irma - 78
 Fakta - 407

Online Supermarkets:
 Nemlig.com
 Osuma.dk

Dagrofa

Spar - 139
 Min Købmand - 171
 Meny - 121

Reitan Distributions

Rema1000 - 304

+

Løvbjerg - 16
 ABC Lavpris



Trendy take-away chains

42 Raw

- Delicious raw food
- Vegan and glutenfree
- www.42raw.dk

Palæo

- "Primal gastronomy" according to the popular paleo diet
- www.palaeo.dk

WeDoFood

- 3 locations in Copenhagen
- Focus on mixed salads according to customers wishes
- www.wedofood.dk

Homemate

- A food-concept to serve busy people with tasty and healthy meals using seasonal products
- 8 locations
- www.shop.homemate.dk





BUSINESS FINLAND ORGANIC 2017

- 11,3 billion DKK – 1,5 billion EUR**
- 31% growth from last year**
- E-commerce is growing in this segment as well**
- Organic products have 13,3% share of food retail**

ROLE OF E-COMMERCE

Denmark is a digital front-runner

77 per cent

of the Danes shop online.
We are more digital than other EU-citizens.





CONSTRUCTION AND INFRASTRUCTURE

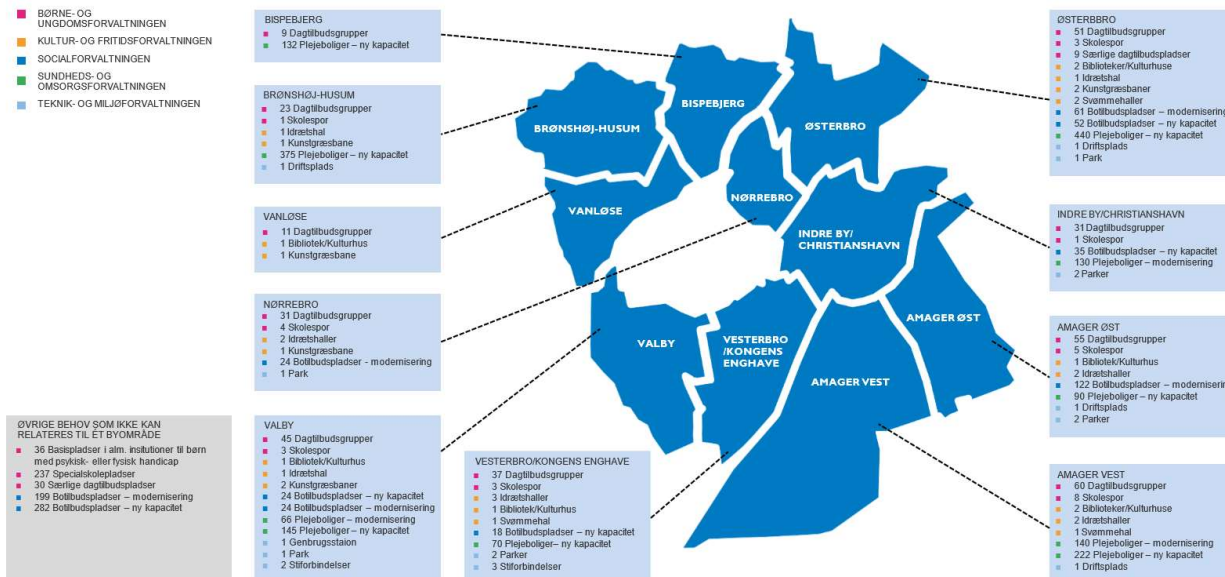
CONSTRUCTION

Several large building projects are taking place in Denmark, since hospitals, schools and new infrastructure are being build or renovated. At the same time, a lot of new apartments and living areas are built due to growing population in Copenhagen area

- 134M EUR has been budgeted for school renovations and 524M EUR for campus building.
- Railroads and road structures are renovated for 6,4b EUR
- City of Copenhagen will build several new living areas as well as an artificial island called Lynetteholmen
- 26,8 b EUR has been invested in expanding the Copenhagen airport to handle more than 40 000 passengers a year



NEW FACILITIES FOR 1,34 BILLION EUR BY 2030

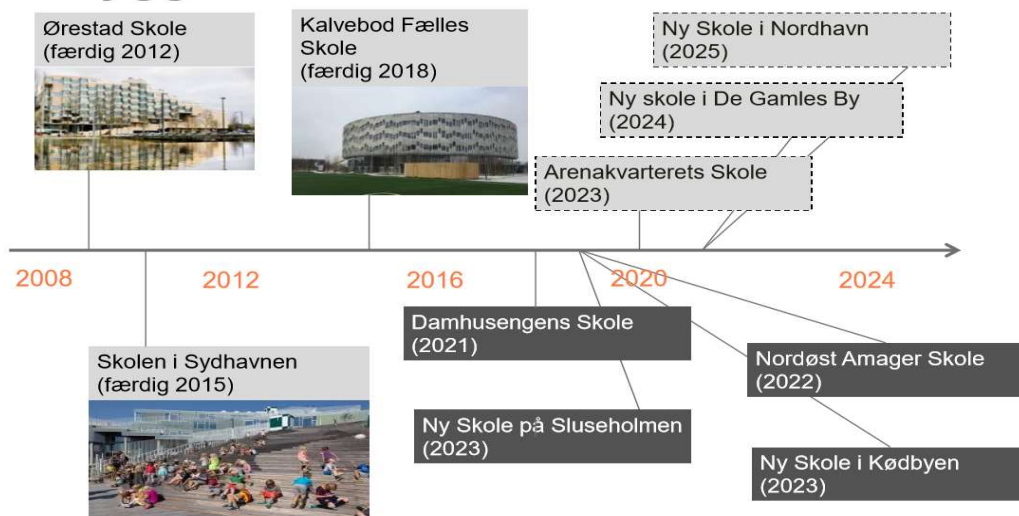


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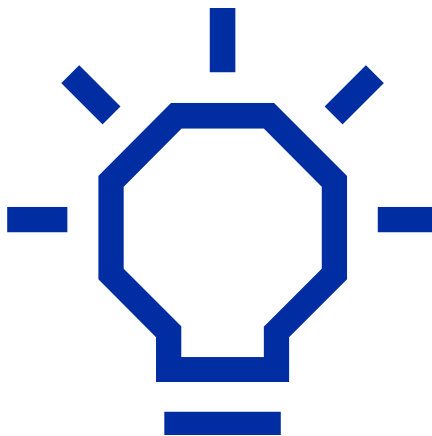
KØBENHAVNS KOMMUNE

Københavns Kommunes indkøbspolitik 2019-2022

Nyt skolebyggeri







WHAT ARE MARKET OPPORTUNITIES?

Identified trends or business potential for Finnish companies on local markets

Business Finland has over 140 professionals around the world, who together with Finnish missions abroad, report on possible market opportunities from their respective countries

All published market opportunities can be found at:
www.marketopportunities.fi

Danes have had the highest cancer rates in the world and the worst cancer survival rates of the Nordic countries – there has been a huge investment to improve it and it seems to work

- Only 60% of patients survive for more than five years after diagnosis
- Government's fourth national plan to fight cancer "Cancer Pack IV", total worth of the planned funding: 2.2 billion DKK (300 million EUR)
- Demand for new solutions in the field of oncology:
 - earlier detection of cancer
 - improvements of treatment and follow-up of patients
 - coherent tracking of patients
 - increasing capacity at hospitals as well as gathering
 - analyzing and usage of data
- Digital solutions for measuring outcome and quality of healthcare services in high demand

CANCER IN DENMARK



The Danish governments national plan "Cancer Pack IV":
<https://www.sst.dk/da/sygdom-og-behandling/kraeft/nationale-planer/kraeftplan-iv>

DEMENTIA FRIENDLINESS EFFORTS

In total, over 80 000 people have dementia in Denmark

- Municipalities: Dementia-friendly urban planning
 - The first dementia village in Denmark, Bryghuset in Svendborg, was opened in 2016
 - Another dementia village, "City for Life" in Odense, is on its way
- National dementia plan for 2025
 - Government funding: 470 million DKK (63.1M EUR)
 - Early and proper diagnosis of dementia
 - Better quality of care and rehabilitation
 - Dementia-friendly communities and housing
- Demand for technology and smart solutions in sensor technology, apps, security solutions, communication solutions, dispensing and handling of medication etc



Market opportunity:

<https://www.marketopportunities.fi/dementia-efforts-in-denmark-creates-business-potential-for-health-tech-companies>

White paper: Denmark – A Dementia Friendly Society:

<http://healthcaredenmark.dk/media/1626294/HCD-Dementia-white-paper-v1-single-0318.pdf>

ASSISTED LIVING AND TECHNOLOGY

Danish municipalities are actively searching and implementing new assisted living technologies to support their citizens.

Solutions are needed in:

- Stimulating senses and virtual home care
- Sensor technology
- Better use of health data
- Digitally supported rehabilitation,

Offerings relevant to this opportunity:

- Help citizens to manage their lives independently at home for a longer time
- Help citizens to manage their sicknesses from home
- Offer rehabilitation solutions
- Offer solutions, which are easily scalable and mature enough
- GDPR
- Ethics in monitoring

Norcare project workshop in Denmark:

Nordic Homecare Cluster Platform – Event in DK in February 5-6th.

<https://en.welfaretech.dk/projects/norcare>



Market opportunity:

<https://www.marketopportunities.fi/lot-of-opportunities-for-health-tech-solutions-and-assisted-living-technologies-in-denmark>

DEMAND FOR HEALTHY FOOD AND PREMIUM ALCOHOL

Health and wellness remains a strong trend in Denmark and there is a wide interest for natural and organic products.

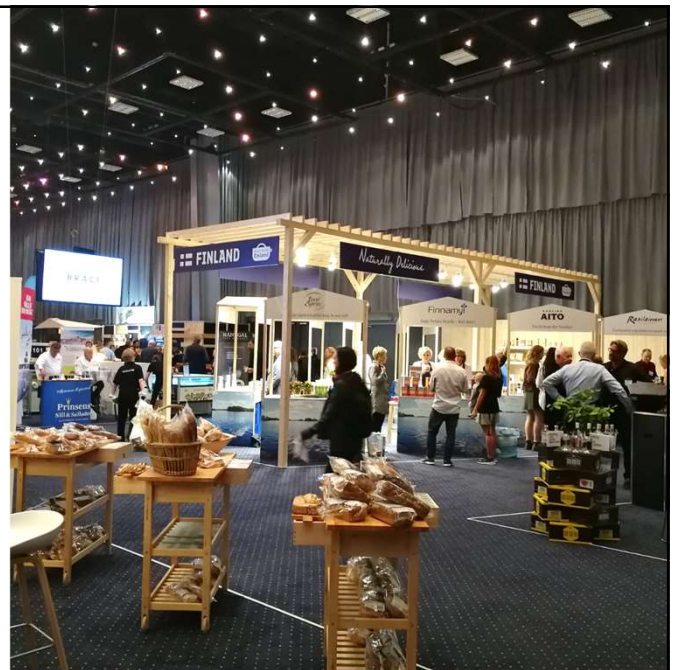
The quality-seeking Danes also value Finnish premium alcohol

- Finnish products are valued because of their high quality
- Finland produces a large range of free from -products
- Premium alcohol inspired by the Nordics is in high demand in Denmark
- Quality gin and liquires
- Microbrewery beer

Relevant offerings from Finland

- Premium food products
- Premium alcohol products
- Healthy snacks
- Free from -food products: gluten free, lactose free
- Vegetarian products
- Organic products

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Market opportunity:

<https://www.marketopportunities.fi/danish-demand-for-healthy-food-and-premium-alcohol>

LOVE FOR UNIQUE FINNISH DESIGN IN DENMARK

Consumers' interest in durable and well-designed products continues to increase in Denmark.

- Similar preferences for simplicity, practicality and beauty, the qualities that can be described as the Nordic DNA.
- Interest in the longevity of products, and good quality is often preferred over mass-produced items.
- Drawing inspiration from nature and using locally produced, recycled and sustainable materials
- Relevant Finnish offering
 - Well-designed everyday products
 - Sustainable solutions
 - Furniture
 - Office furniture



Market opportunity:

<https://www.marketopportunities.fi/love-for-unique-finnish-design-continues-to-increasein-demark>

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EXAMPLES OF COOPERATION WITH FINNISH COMPANIES



PAST EVENTS 2018

Business Finland organized

Health

- Representatives from Danish municipalities/regions visited Finland (Feb)
- Cancer Round Table (Mar)
- Ambassador Vesa Vasara led the delegation of six Finnish companies that met the mayor of Odense and important actors in the health sector (Apr)
- Team Finland business delegation visit to Denmark led by Minister Anne-Mari Virolainen (Sep)
- WHINN (Week of Health and Innovation) in Odense (Oct)

Creative Industry

- Nordic design event at BLOX (Nov)

UN

- Nordic UN Procurement Seminar (Nov)

Food

- Chocolate & Gin tasting event with Goodio and Kyrö Distillery (Feb)
- Bite Copenhagen Fair (Aug)

Maritime

- Greenshipping event (Nov)

ICT

- MaaS event at the same time with ITS World Congress in Copenhagen 17.9.2018
- E-commerce event (Oct)



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WELCOME TO DENMARK!

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