



GREATER  
**CoPENHAGEN**

Greater Copenhagen  
**The growing hotspot  
for global logistics**

**Want to expand your logistics, supply chain and  
e-commerce business in Europe and beyond?**

# Greater Copenhagen offers you the best of all worlds

Greater Copenhagen is the growing hotspot for global logistics and from here you can expand your logistics, supply chain and e-commerce business in Europe and beyond.

Greater Copenhagen is a growing hotspot for global logistics with many leading global logistics companies, large infrastructure investment opportunities and excellent local and intercontinental connectivity.

The metropolitan region is a preferred hub for logistics and supply chain management across industries, offering large cargo and logistics parks with direct access to highway, railway and sea transport to the rest of Denmark and the Nordics as well as to Germany and through to continental Europe.

European companies working in Greater Copenhagen get the strength and dependability of a complete package: an inclusive and co-operative industry, excellent ROI, a buoyant economy and readily available skilled labour.

Greater Copenhagen is a great place to live, too. It is safe, clean and well-functioning. There is a strong infrastructure, most people speak English and the quality of life is very high.

# Greater Copenhagen is open for business



**No. 1**

in Europe  
for ease of  
doing business

The World Bank, 2012-2018



Strong industry clusters  
for **food, cleantech  
and life sciences**



World's  
**3rd best  
distribution  
infrastructue**

IMD 2018



**Leading cool chain**  
for food and  
pharmaceutical logistics



**Highest  
population  
density in  
the Nordics**



**Highly  
skilled  
workforce**



**The Nordic e-commerce market is the  
4th largest in Europe** measured on  
online revenue



**Efficient air and  
seaport logistic hubs**



**Largest and most efficient  
airport** in the Nordics

# Greater Copenhagen is the growing hotspot for global logistics

Ranked amongst the top 5 logistics regions in Europe, Greater Copenhagen offers a unique platform for growth and an opportunity for European and global expansion.

## Top 10 logistics regions as assessed by Catella Research 2016

Region, country	Ranking	Overall	Socio-economic (25%)	Real estate market (35%)	Infra-structure (40%)	Prime rents* (in €/m²)	Top yield** (in %)
Greater London, UK	1	8.73	2.08	3.21	3.44	14.50	4.25
Oslo and Akerhus, NO	2	7.05	0.66	2.63	3.76	10.30	5.75
Île-de-France, FR	3	6.99	2.42	1.93	2.64	4.60	5.75
Cataluña, ES	4	6.90	1.00	2.45	3.44	6.50	6.00
<b>Copenhagen, DK</b>	<b>5</b>	<b>6.89</b>	<b>0.83</b>	<b>2.22</b>	<b>3.84</b>	<b>5.60</b>	<b>7.00</b>
Hamburg, DE	6	6.85	1.13	2.68	3.04	5.60	5.00
Duisburg/Niederrhein, DE	7	6.82	0.92	2.22	3.68	5.10	5.00
Rhein-Main, DE	8	6.81	1.25	2.28	3.28	6.10	5.00
Berlin/Brandenburg, DE	9	6.80	1.13	2.15	3.52	4.70	5.00
Stockholm, SE	10	6.76	0.83	2.57	3.36	6.90	5.75

**Score:** The model uses quantitative and qualitative-related data. Ratings on a scale from 1 (very poor) to 10 (very good).

# The highest population density in the Nordics

Greater Copenhagen spans Eastern Denmark and Southern Sweden and since 2000, the 20 kilometres long Øresund Bridge has connected the two countries.

Home to 4.3 million people, Greater Copenhagen is the region within the Nordics with the highest population density. Nine million people live within a 300 kilometer radius of Copenhagen, and from Greater Copenhagen you can reach 36% of the entire Scandinavian population within a 3-hour drive.

Across the wider Nordic region, encompassing Denmark, Sweden, Norway and Finland, and home to a population of 25 million, 20 million people live within 300 kilometres of the four Nordic capitals. As a result, the vast majority of Scandinavian consumers can be reached the same day and when including the Baltic States, more than 70 million consumers can be reached overnight.

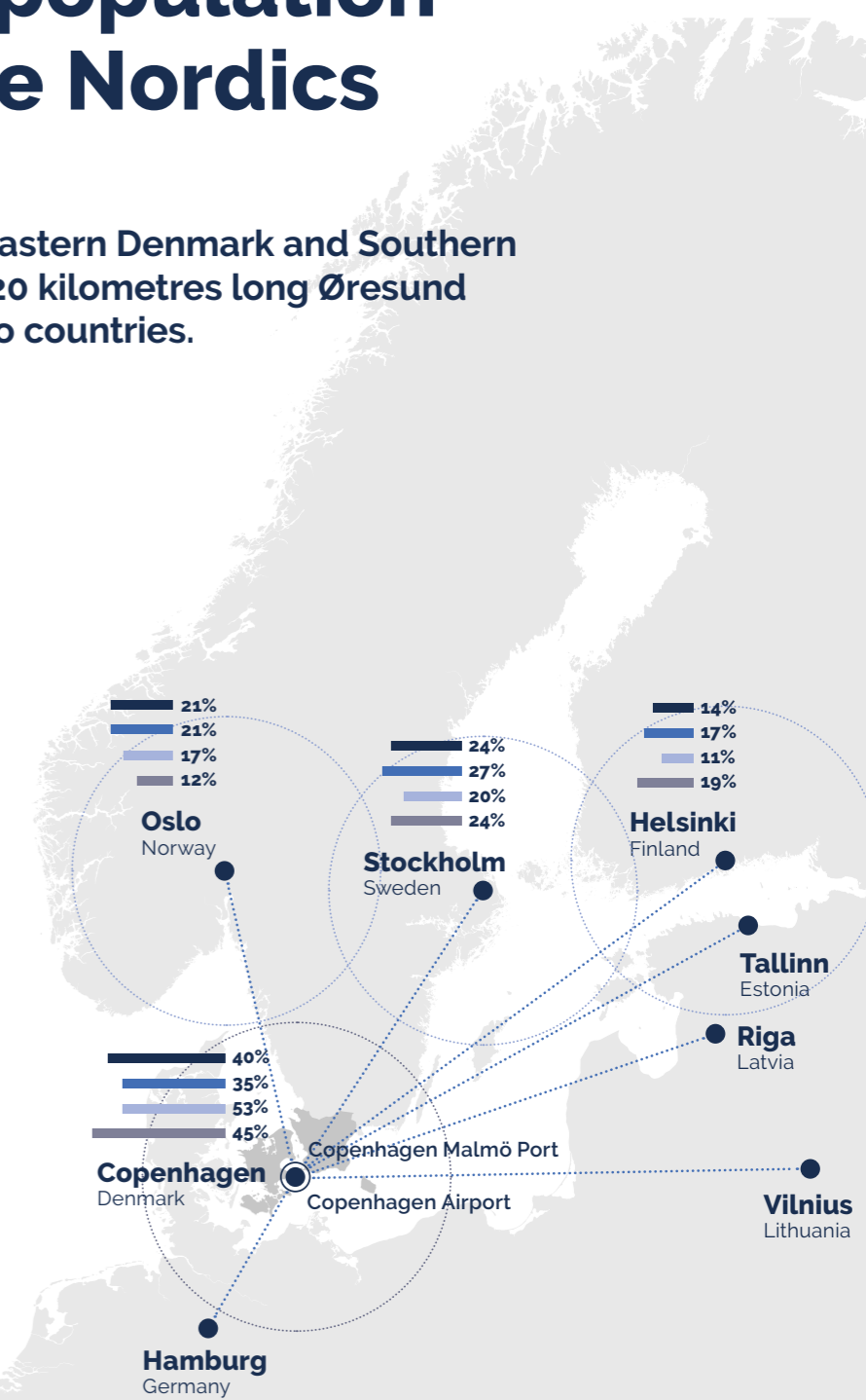
### Main hubs

Copenhagen Airport  
Copenhagen Malmö Port

### Share of totals in the four capital regions

- ⋯ 16-24 hour delivery
- Companies with international presence
- Foreign owned companies
- Large companies (> 100 FTE)
- Population aged 15-64
- Nordic capitals incl. 300 km radius from city centre

Source: Bureau van Dijk/Odin/Orbis, 2015; Eurostat, 2014



45%

Reach up to 45% of the Nordic population within a 300 km radius from Copenhagen



## Strong infrastructure for road and rail transport

**2.5  
HOURS**

from **Hamburg to Copenhagen**



**Fehmarn Tunnel**

is the largest infrastructure  
project in Europe

**58% of goods in and out of the Copenhagen region  
are moved by road**

With a highly well-developed infrastructure, Copenhagen offers easy and cost-saving transport to the Northern European markets. Denmark was ranked third on distribution infrastructure in the world by IMD in 2018.

**Motorways and bridges interconnect Denmark**

The Øresund bridge links Denmark to the rest of the Nordics. Several new infrastructure projects are underway, including the Fehmarn Belt Tunnel, linking Denmark to Germany. Scheduled to open in 2028, the 20 km tunnel will connect Copenhagen directly with mainland Europe. Travel time between Copenhagen and Hamburg in Germany will be reduced from 4 hours to 2.5 hours.

## Logistics parks



**Greater Copenhagen** offers  
same-day deliveries to cities such  
as Oslo, Stockholm, Helsinki  
and Gothenburg



Photo of STC (shown on map on page 7).

## Business Park Falster Industrial & Logistic Park

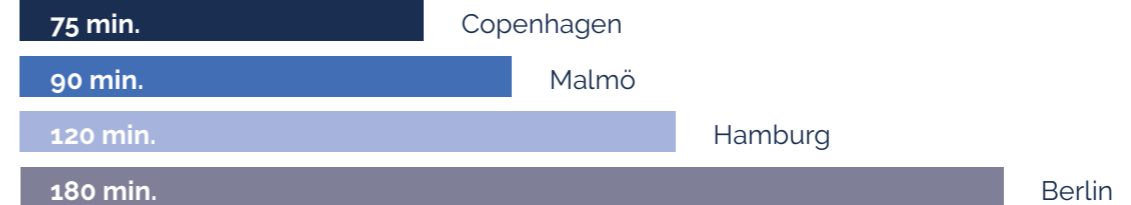
Business Park Falster Industrial & Logistic Park in Southern Denmark is located only 2 hours by car from Hamburg in Germany and 75 minutes by car from Copenhagen City.

With over 1 million square metres of land ready for industrial development, this unique location provides easy access to the Nordic and North European markets, including direct access to highways and rail links heading south, north and westbound and ferry lines to Germany.

The Fehmarn Belt Tunnel, will cut short freight transport between Germany and Sweden by 160 km as well as double the capacity for the rail network in Denmark as a link between Germany and the Nordics.

Transport-centre Lolland-Falster hosts a number of international industrial & logistic companies, such as Hardi, Man Diesel, Bluewater Shipping and Vestas.

### MINUTES BY CAR



## The Scandinavian Transport Centre (STC)

The Scandinavian Transport Centre (STC) at Køge is one of the largest unified business and transport centres in Denmark.

It is connected to all the main highways in Denmark, the main European road network, and is located only 30 minutes from Copenhagen Airport and very close to the port of Køge, which plans to expand to twice its size by 2020.

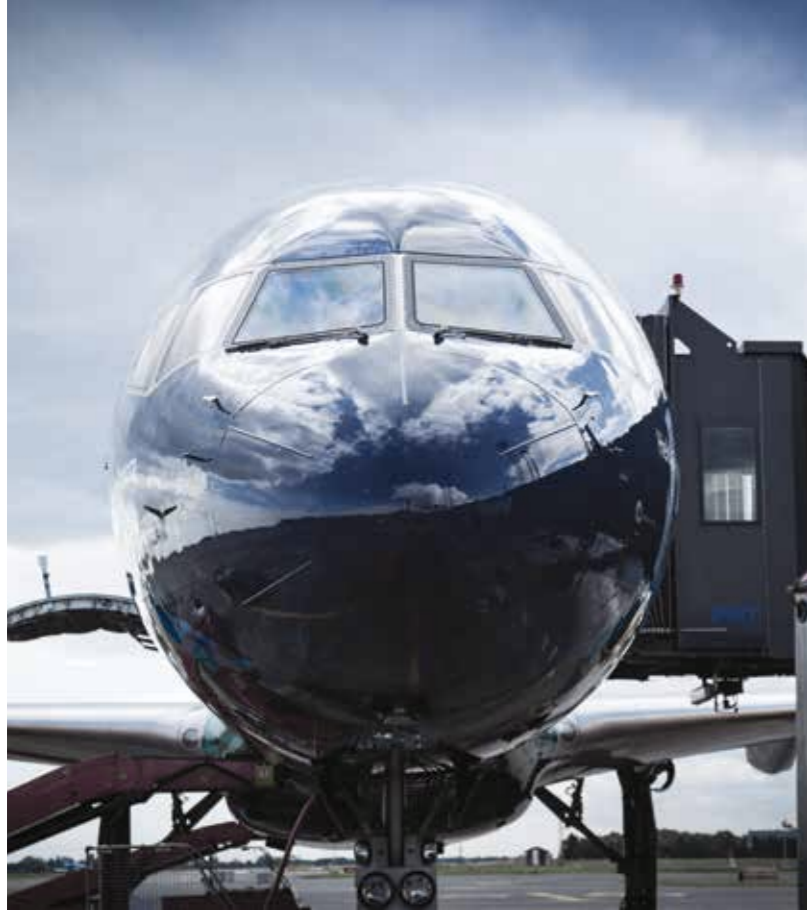
The STC has a traditional transport centre and a large area for business. The business area includes both available and sold plots and building projects spanning 5,000 square metres and beyond.

**30**  
minutes

from Copenhagen Airport  
to The Scandinavian  
Transport Centre (STC)



# The best airport in Northern Europe



**Copenhagen Airport** is the world's gateway to Northern Europe. With more than 174 routes, Copenhagen Airport covers more destinations and markets than any other Scandinavian airport. Copenhagen Airport is the main airport for Denmark and the entire Greater Copenhagen area also covering Southern Sweden, home to 40 percent of the Swedish population. In 2017, 29 million passengers flew in and out.

In 2018 and the years beyond, Copenhagen Airport plans to double its size, including terminals, aircraft stands and additional airside facilities. The expansion will also make room for a new large cargo and logistics park linked directly to the existing cargo area and close to the highway.

Serving more than 70 airlines, Copenhagen Airport accommodates all major international and domestic airlines and serves as the Nordic hub for global logistics providers such as FedEx, DHL, PostNord and Kuhne & Nagel.

In 2018, Copenhagen Airport was awarded "Best Airport in Northern Europe" for the fifth time in six years at the Skytrax Awards.



# Shipping and maritime logistics

The Danish shipping sector is currently among the world's most competitive, with foreign currency earnings of DKK 203 billion in 2015. Danish shipping accounts for close to 10% of the total turnover from the global maritime goods transport. The Danish maritime cluster encompasses more than 11,600 companies such as A.P. Moeller-Maersk and DFDS, and employs over 100,000 people.

The Copenhagen-Malmö Port is the largest hub for new cars in the Nordics and the Baltic Sea region, and it is the leading cruise port in Northern Europe, with over 1 million passengers annually.

**10%**

of the entire world's trade is transported by Danish shipping companies

**Massive expansion plans**

29 million passengers per year to increase to 40 million

New 300,000 sqm cargo and logistics park

Approx. 3 Billion Euros invested in new expansion





Photo: Thomas Høyrup Christensen

# Greater Copenhagen - high focus on Green Urban Mobility

**Greater Copenhagen** has a high focus on green urban mobility. The recently formed Danish government has a high focus on transport and green transition of the transport sector. They have already decided to develop a green mobility plan with focus on:

- A ban on sales of all new diesel and petrol cars by 2030
- Environmental zones in Denmark's five largest cities
- Better incentives for Electric Vehicles
- A greener collective transport
- Initiates long-term initiatives for sustainable aviation

**Environmental zones in Denmark's five largest cities, increasing environmental requirements for lorries, buses and vans.**

The Danish Ministry of Energy, Utilities and Climate

## Leading industry clusters

**The transport and logistics cluster** employs 85,000 people, of which 47,000 are working directly with international transport, representing more than 20% of Denmark's total exports. Global logistic providers using Copenhagen as their Nordic hub: A.P Møller-Maersk, DFDS, DHL, DSV, TNT, FedEx, PostNord, Kuhne & Nagel.

**The life science and pharmaceutical cluster, Medicon Valley**, is one of Europe's strongest with more than 350 R&D companies, including Novo Nordisk, NovoZymes, Lundbeck, Ferring, Coloplast and Biogen. The Nordic region is one of the largest pharmaceutical markets in Europe, and 90% of pharmaceutical production in Denmark is exported.

**The food cluster** offers access to world-class food producers, research-intensive universities and strong business partners. Local industry leaders include Carlsberg, Danish Crown, Kelsen Group and Arla Foods.

**The e-commerce cluster** offers international companies plenty of opportunities for further expansion. The Nordic e-commerce market is the 4th largest in Europe measured on online revenue.

**The mobility cluster** highly focuses on green energy, and Copenhagen aims to be the world's first carbon-neutral capital city by 2025. Some of the major goals set to be reached by 2025 within the area of green mobility, is for public transport to be carbon neutral and 20-30% of all light vehicles and 30-40% of all heavy vehicles to run on new fuels.



## The CPH 2025 Climate Plan

The city of Copenhagen aims to be the world's first carbon-neutral capital city by 2025. The CPH 2025 Climate Plan is a holistic plan as well as a collection of specific goals within four areas: energy consumption, energy production, green mobility and the City Administration. Some of the major goals set to be reached by 2025 within the area of green mobility, is for public transport to be carbon neutral and 20-30% of all light vehicles and 30-40% of all heavy vehicles to run on new fuels.

The City of Copenhagen and State of Green

### Copenhagen city buses will be electric by 2025

All diesel-powered buses in Copenhagen will be replaced by electric buses by 2025. This will contribute to the City of Copenhagen's goal of becoming carbon neutral. City buses in Copenhagen must be powered by electricity – or have the same environmental and noise-reducing properties as electric buses – no later than 2025. This initiative will contribute to the City of Copenhagen's goal of becoming carbon neutral by 2025.

### Green bus fleet by 2025

For two years, the City of Copenhagen, transport company Movia and energy company E.ON have tested electric buses, and 92 percent of passengers are happy. Copenhagen will now invest heavily in green transport.

“

**All Copenhageners should be able to go about the streets of Copenhagen without the risk of getting respiratory diseases. It is our ambition to replace the entire bus fleet in Copenhagen with busses which do not pollute but are powered by green energy.**

Frank Jensen, Lord Mayor of Copenhagen

# Nordic e-commerce

## Nordic e-commerce for EUR 21.7 billion

The Nordics represent a combined market of 26 million people, with a GDP of \$1.4trn, which ranks the region as the 12th biggest global economy. The very well developed infrastructure makes the Nordics a booming region for e-commerce activity.

Norway, Sweden, Finland and Denmark are the top four countries for penetration of online shopping among the population.

The most popular categories are clothing, footwear, media, home electronics and beauty & health products.

The population is engaged with technology, and increasing levels of innovation are driving demand. With good air and road links with continental Europe and the rest of the world, international deliveries can compete with local availability and access a full range of options, such as parcel lockers, click & collect and domestic parcel services.

With an eFulfillment centre in Greater Copenhagen, your company can provide delivery within 24 hours or less to 100 million e-commerce ready consumers in Scandinavia and Northern Europe.

The Nordic e-commerce market is the 4th largest in Europe measured on online revenue

Cushman & Wakefield

In 2017, Nordic online consumers spent a total of

€ 21.7 billion

PostNord, 2018

## The Nordic's e-commerce hub

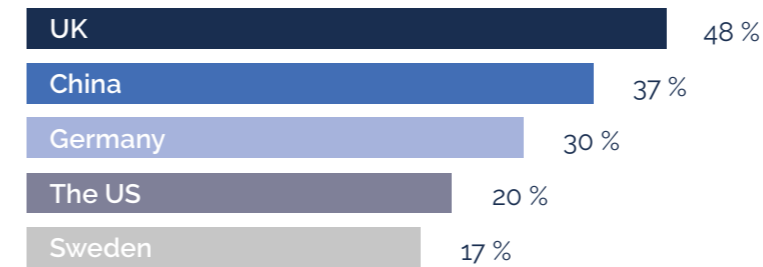
Denmark offers the world's 3rd best distribution infrastructure. Denmark is also ranked amongst the best in the world in terms of broadband subscribers, connectivity between people and technology and information technology skills (IMD, 2018). This makes Greater Copenhagen an obvious choice as the Nordics' main hub for e-commerce.

## Digital infrastructure in Denmark

Denmark ranks 1st of the 28 EU Member States in the Digital Economy and Society Index 2018 and it highlights Denmark as a leader in digitisation. Denmark is particularly strong in the delivery of online public services.

In 2017, total Nordic e-commerce consumption from abroad amounted to EUR 3.8 billion. The rise in trade across national borders is one major effect of digitalisation and e-commerce. In 2017, on average, one of three Nordic e-commerce consumers stated that they had shopped from abroad in the past month.

## Top 5 most popular countries to shop from



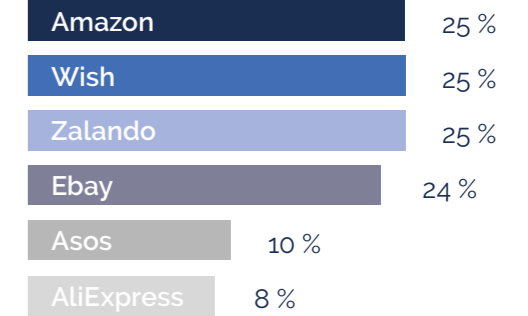
Source: DIBS, Payment Services, 2018

7<sup>th</sup>

in world on information technology skills

IMD, 2018

## Most popular foreign websites



## 3 tips for e-retailers who want to set up operations in the Nordic region

1

### Local Familiarity

Make sure to have a local presence on the markets to which you sell, either in the form of one's own operation or a partner, for example a PR agency. Otherwise it can be difficult to understand customers' needs.

2

### Adapt the Language

Everything should be available in the local language, from the website to return slips, emails and customer service. Translations should also be quality assured, preferably by a partner on the actual market.

3

### Let Customers Decide

Customers in the Nordic countries have a lot in common, but there are also differences. Check out what applies, for example when it comes to which payment and delivery methods are most popular in different countries.

Source: PostNord, 2018

## FDIH

The Danish E-commerce Association (FDIH) works to strengthen the framework conditions for e-commerce in Denmark and internationally

In 2017, the Danes shopped online for

€ 5.5 billion

PostNord, 2018

49 %

of the Danish consumers have shopped from abroad

DIBS, Payment Services, 2018

100 million

e-commerce-ready consumers can be reached from Greater Copenhagen within 24 hours or less

# Hub for temperature-controlled logistics for food and pharma

Greater Copenhagen is the hub of Northern Europe for temperature controlled Pharma, Biotech and Food Logistics.

Temperature controlled transportation and logistics providers using Copenhagen as their gateway to worldwide distribution include World Courier, DHL, Bring Fargo, UPS, FedEx, Kuehne & Nagel and Foodservice.

Transportation and logistics in the Pharmaceutical and food supply chain, especially perishables, requires a commitment on the part of 3PLs and cold storage providers to continually invest in their own operations to meet the needs of their customers' operations. Significant investment is taking place in Greater Copenhagen.

## High export rates

- **90% of pharmaceutical production** in Denmark is exported.
- **136,000 tons of medical products** in measured doses traded with EU and EFTA member states in 2014.
- **11.4% of Denmark's total exports** are pharmaceuticals.
- **The Danish food and beverage industry represents 25 %** of total product export.



## FoodService Danmark

In Q3 2017 FoodService Danmark one of the leading suppliers of food service in Denmark will move into a newly built state of the art 30,000 sqm distribution centre on a 75,000 sqm land plot. The majority of the warehouse will be temperature controlled. The location: Ishøj, only 20 km from Copenhagen city centre, will give FoodService Danmark an important competitive advantage.

## Nomeco

The location of Nomeco's new giant warehouse and logistics centre of pharmaceuticals is now determined: It will become part of Scandinavian Transport Centre, which serves as an important bridge for overland transportation between the Nordic countries and the rest of Europe.



# Talent and employees

When it comes to qualified employees, Greater Copenhagen has a lot to offer. Almost 90% of the population speak English and 53% speak German.

The MSc in Supply Chain Management at Copenhagen Business School was ranked no. 1 in Northern Europe in the 2018 SCM World University 100 Ranking and no. 7 among schools in Europe, Middle East and Africa. It was also ranked among the 10 best programmes worldwide in the 2015/2016 Eduniversal Best Masters Ranking.



## Language Proficiency

- 53% Speak German
- 86% Speak English



## Why we chose Greater Copenhagen

### Biogen

Biogen has placed its European sales office and large production facilities in Greater Copenhagen. This is owing to the local talent pool, the leading life science cluster Medicon Valley, and competitive operational costs.

### UNICEF

UNICEF has placed its global supply warehouse and logistics operations in Greater Copenhagen. The geographic location, easy access to international transport hubs and efficient landing rights and customs clearing were decisive factors.

### PHOENIX Group – Nomeco

Nomeco chose Greater Copenhagen for its new state-of-the-art pharmaceutical warehouse, serving the company's Nordic logistics hub. The decisive factor was excellent infrastructure, including the coming Fehmarn Belt Fixed Link, tying together Northern Europa.

### H.ESSERS/NEFF

H.Essers is a premium logistics provider that offers customized and integrated transportation and logistics solutions across the world. They chose Greater Copenhagen for its big potential in niche sectors such as the pharmaceutical, biotech & chemical industries.

## Low company tax and Europe's most flexible labour market

**The easiest  
place** in  
Europe to do  
business

The World Bank, 2012-2018

**The company tax** in Denmark is 22%, which is below the average OECD and EU level. Moreover, Denmark offers a unique double taxation rule of 0%, making Denmark the perfect base for business expansion to other countries.

Denmark has Europe's lowest rate of social security contribution on salaries. The country is also famed for its "flexicurity" labour market model, providing the most flexible employment legislation in Europe. The term covers maximum freedom to adjust the workforce to fit your company's order volume without compromising the employees' need for security.

# Partners and associations



## Maritime Development Center - MDC

The Maritime Development Center is the cluster organization for the Blue Denmark, and a network organization for maritime business and innovation. The association counts 178 member companies representing the entire maritime cluster. MDC is awarded the Gold label for cluster excellence according to the European standard issued by European Secretariat for Cluster Analysis meaning that MDC is among the elites of Denmark's clusters.



## Transportøkonomisk Forening - TØF (The Danish Society of Transport Economics)

The Danish Society of Transport Economics is an independent association. The association is a professional forum across all modes of transport where knowledge, experience and management skills are exchanged and disseminated. This covers transport politics, logistics, value changes, transport engineering and transport economics as well as research and training. Since its founding in 1969, TØF has obtained a central position as a discussion forum and first mover for an educated debate on transportation.



## The Transport Innovation Network - TINV

The Transport Innovation Network is a national, cross-disciplinary network aimed at the Danish Transport sector. The primary objectives of TINV are to create synergy, encourage match-making and generate research and development projects between stakeholders in the transport sector and research- and educational institutions, as well as related sectors such as energy and infrastructure.



Confederation of Danish Industry

## The Confederation of Danish Industry - DI

The Confederation of Danish Industry is funded, owned and managed entirely by approximately 11,000 companies within the manufacturing, trade and service industries. DI is a trade organisation and an employers' association. As a trade organisation, DI ensures that the Danish business community has the best possible foundation for competing, developing and manufacturing in Denmark and internationally. As an employers' association, DI is responsible for collective bargaining at a national level and within the individual sectors and companies.



## Wonderful Copenhagen

Wonderful Copenhagen is the official tourism organization for The Capital Region of Denmark, working to promote and develop both business and leisure tourism in The Capital Region of Denmark on a non-profit basis. Wonderful Copenhagen is a commercial foundation funded by a mix of contributions from private businesses, organizations, and public institutions, including perennial financing agreements with The Capital Region of Denmark.





# How can we help your company?

**Copenhagen Capacity supports foreign companies, investors and talent in identifying, releasing and capitalising on business opportunities in Greater Copenhagen — from initial considerations to final establishment.**

We provide free and fully confidential business consulting services to foreign-owned companies who want to expand their business to Greater Copenhagen and beyond.

**Business information**, industry reports and benchmark analyses

**Support from business consultants** with profound hands-on industry knowledge

**Access to a large network** of businesses, authorities and service providers

**Unbiased cost calculation** and location tools

**Practical assistance** during the entire process of setting up your business

## Contact



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# GREATER CoPENHAGEN

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