The Danish Defense Industry - Market Opportunities and Entry Strategies, Analyses and Forecasts to 2017

Description: This report is the result of SDI’s extensive market and company research covering the Danish defense industry. It provides detailed analysis of both historic and forecast defense industry values including key growth stimulators, analysis of the leading companies in the industry, and key news.

Introduction and Landscape

Why was the report written?

The Danish defense Industry - Market Opportunities and Entry Strategies, Analyses and Forecasts to 2017, offers the reader an insight into the market opportunities and entry strategies adopted by foreign original equipment manufacturers (OEMs) to gain market share in the Danish defense industry.

What is the current market landscape and what is changing?

During the review period, Denmark’s ministry of defense (MoD) allocated an average of 75.6% of its total defense budget to revenue expenditure, and the remaining 24.4% to capital expenses. Capital expenditure is estimated to increase to 25.5% of the total defense budget during the forecast period as a result of increasing investment in equipment as the country modernizes its armed forces. The share of revenue expenditure is, therefore, expected to decline to 74.5% of the overall defense expenditure.

What are the key drivers behind recent market changes?

Defense expenditure will be driven by peacekeeping, and counter-piracy and counter-terrorism operations. In support of NATO, Denmark mainly deploys its military forces in Afghanistan, Lebanon, Kosovo, and Iraq, and Denmark supports NATO in its efforts to combat piracy around the Horn of Africa (Operation Ocean Shield), and has contributed support ships, troops, and air surveillance systems. Terrorist activity has increased around the world, and in Europe in particular, countries are facing new terrorist threats; in 2009 alone, there were 294 failed, obstructed, or successfully executed terrorist attacks in EU member countries, and 587 arrests of suspects. To prevent and investigate security threats to the country, the Danish national security intelligence agency PET was created, with a budget of DKK549 million (US$102.8 million) in 2009.

What makes this report unique and essential to read?

The Danish Defense Industry - Market Opportunities and Entry Strategies, Analyses and Forecasts to 2017 provides detailed analysis of the current industry size and growth expectations from 2013 to 2017, including highlights of key growth stimulators. It also benchmarks the industry against key global markets and provides a detailed understanding of emerging opportunities in specific areas.

Key Features and Benefits

The report provides a detailed analysis of the current industry size and growth expectations from 2013 to 2017, including highlights of key growth stimulators. It also benchmarks the industry against key global markets and provides a detailed understanding of emerging opportunities in specific areas.

The report includes trend analysis of imports and exports, together with their implications and impact on the Danish defense industry.

The report covers five forces analysis to identify various power centers in the industry and how these are expected to develop in the future.

The report allows readers to identify possible ways to enter the market, together with detailed descriptions of how existing companies have entered the market, including key contracts, alliances, and strategic initiatives.
The report helps the reader to understand the competitive landscape of the defense industry in Denmark. It provides an overview of key defense companies, both domestic and foreign, together with insights such as key alliances, strategic initiatives, and a brief financial analysis.

Key Market Issues

During the review period, Danish defense expenditure registered a CAGR of -2.32%, and in 2012 is valued at US$4.11 billion. Active participation in NATO and United Nations peacekeeping missions, counter-piracy operations, and measures against potential terrorist threats, stimulated expenditure during the review period. Such factors are expected to drive defense expenditure at a limited pace throughout the forecast period, with spending likely to decrease at a CAGR of -2.79% and to reach US$3.65 billion by 2017. The Danish defense budget stood at 1.3% of GDP in 2012, and is expected to decline to 1% of GDP by 2017 as the country's GDP grows at a faster rate than its defense budget.

During 2009, Danish defense imports demonstrated significant growth, before recording a sharp decline in 2010 and 2011 due to the financial crisis and subsequent reduction in total defense expenditure. The significant growth during 2007 was mainly due to the higher costs of capital additions and equipment support for military operations in Afghanistan, and increased investment in logistics capabilities for the armed forces. However, as the MoD increased the budget expenditure in 2011, imports of defense equipment are expected to register a negative growth due to the country's plan to reduce the defense budget for the forecast period.

Due to lower defense spending during the forecast period, per-capita defense expenditure is likely to decline from US$742.3 during the review period to US$677.2 during the forecast period. Denmark's population is likely to increase from 5.5 million in the review period to 5.7 million by the end of the forecast period.

Key Highlights

Denmark's defense exports are low compared to its defense imports; however, defense exports increased in 2011 with the country supplying sensors to Brunei. During 2007-2011, defense exports have shown significant growth, supported mainly by defense co-operation between Denmark and Lithuania as both countries are members of NATO and the EU. With increasing spending on modernization and offset contracts, Denmark is likely to moderately increase its defense exports over the forecast period.

The Danish homeland security market is represented by the budgets of the police services, fire protection services, law courts, prisons, and others. Denmark's homeland security budget was US$3.35 billion in 2012 and is estimated to increase to US$3.7 billion in 2017. As a consequence of increasing threats to national security in recent years, mainly from Islamist terrorist groups, the government is likely to spend more to counter these threats and allocate more to maintain public order and safety. To prevent and investigate security threats to Denmark, Politiets Efterretningstjeneste (PET) was established with an objective to procure as much information as possible on the capacity, determination, and ability of target persons and groups.
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