



INSIGHT REPORT 2025

Leading the way in robotics innovation

Growth and innovation in Denmark's robotics, automation and drone industry



ODENSE
robotics

About the report



Odense Robotics Insight Report provides insights into the development of Denmark's robotics, automation and drone industry. The report outlines the industry's size and strengths, as well as other key parameters such as financial performance and contribution to the green transition.

Published annually by Odense Robotics, the national cluster organisation, the report builds primarily on data from national statistics and the cluster's annual survey to company members.

Driven by our purpose to improve the world with Danish robotics solutions, Odense Robotics supports robotics, automation and drone companies in accelerating their growth and innovation. Together with partners from across the ecosystem, we strive to realise the industry's potential – so robotics technologies can add value to people, companies and societies worldwide.

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Co-funded by
the European Union



Danish Board of
Business Development

Odense Robotics is co-funded by the Danish Board of Business Development, the Danish Agency for Higher Education and Science, and the European Union, as well as a broad range of projects and partnerships.



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Foreword

” As industries navigate an increasingly complex landscape, market conditions continue to shift, bringing economic uncertainty and growing global competition. Access to capital is tightening, and key export markets are under pressure. These challenges call for resilience, adaptability, and, above all, innovation—areas where Denmark’s robotics industry has historically excelled.

Innovation drives growth amid challenges

Automation remains a crucial driver of productivity and competitiveness, both in Denmark and internationally. Despite the headwinds, the industry continues to push forward, investing in new technologies and developing solutions that help businesses navigate an increasingly complex landscape. AI is playing a growing role, and robotics companies are diversifying across new sectors, from healthcare to energy, opening doors to fresh opportunities.

Denmark has long been a leader in robotics and automation, and our strong innovation ecosystem continues to be a key advantage. We have world-class companies, cutting-edge research institutions, and an internationally recognised robotics, automation and drone cluster that fosters collaboration and growth.

As this report highlights, the industry remains on a growth trajectory, but the road ahead is not without challenges. At Odense Robotics, we are committed to supporting companies in overcoming barriers and unlocking new opportunities—so that Danish robotics can continue to thrive and shape the future of automation worldwide. ”



Søren Elmer Kristensen
CEO, Odense Robotics

Executive summary

Despite market challenges, Denmark's robotics, automation, and drone industry continues to grow and remains internationally recognised as a global frontrunner. The industry has expanded steadily, maintaining a positive outlook despite increasing economic pressures.

Today, there are +600 robotics, automation, and drone companies in Denmark, employing a total of 19,500 people. While workforce growth has slowed compared to previous years, companies remain optimistic and anticipate continued expansion.

The industry has demonstrated stable growth. The most recent financial figures show that in 2023, the industry generated a turnover of EUR 4.6 billion, of which EUR 2.4 billion came from exports. As in previous years, Germany and the USA remain the most important export markets, followed by the UK and Norway.

Innovation remains a key driver of growth. In 2024, two out of three robotics companies launched new products, underlining the industry's commitment to technological development. AI continues to play a growing role, and companies are increasingly expanding into new sectors such as healthcare, agriculture, and energy, creating fresh opportunities in a shifting market.

A challenging market

Companies report that market conditions have become more difficult, with growth barriers increasing across the board. The three most significant challenges facing Danish robotics companies are:

- **Limited time, resources, and funding for innovation and product development**, cited by **81%** of companies as a key constraint.
- **Lack of customer awareness** about the benefits of robotics and automation solutions, also highlighted by **81%** of businesses.
- **A shortage of qualified workforce**, identified as a challenge by **74%** of companies.

For Denmark's robotics, automation, and drone industry to fully realise its growth and innovation potential, addressing these challenges will be crucial.

Denmark's robotics industry in figures



The industry

605 robot, automation, and drone companies in Denmark

19,500 employees in total

EUR 4.6 billion turnover in 2023

EUR 2.4 billion exports in 2023

EUR 1+ billion invested in companies since 2015



Our members

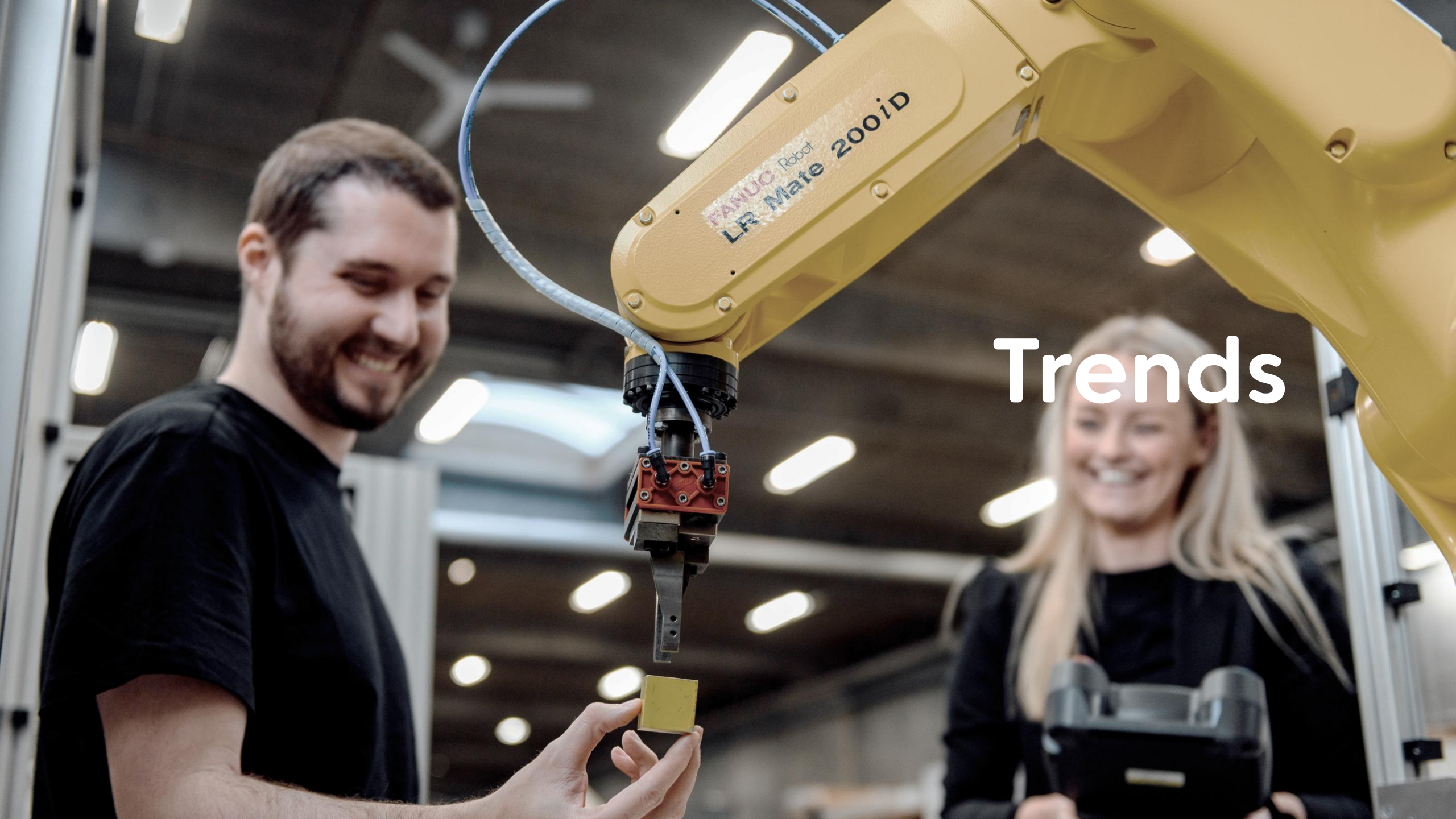
350+ members

25% established since 2020

69% developed and launched new solutions last year

63% say implementing existing strategy will drive growth in 2025

71% say AI will be the key technology shaping development in coming years



FANUC Robot
LR-Mate 200iD

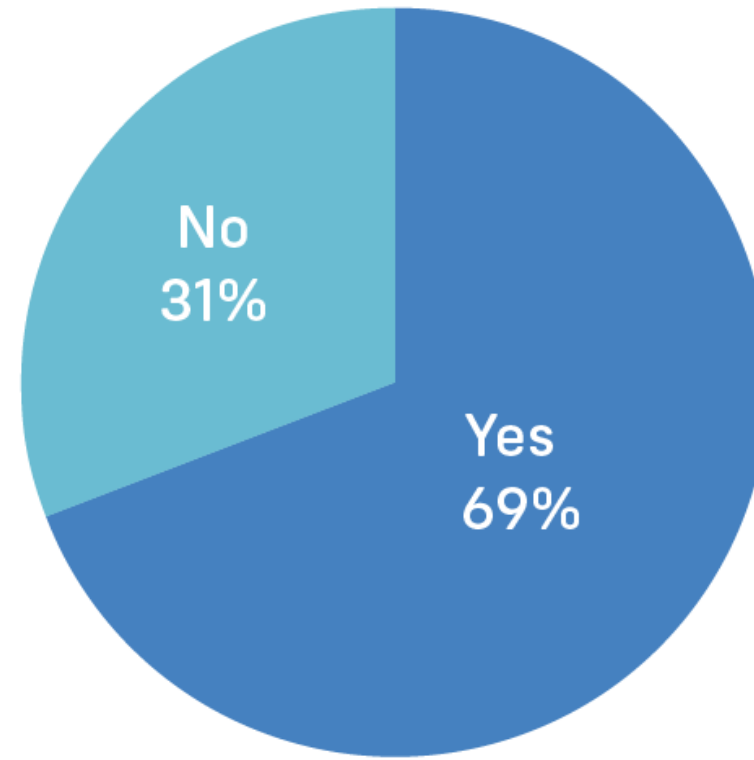
Trends

Innovation is thriving, delivering new solutions

There is a high level of innovation in Denmark's robotics, automation and drone industry.

69% of companies developed and launched new technological products in the past year.

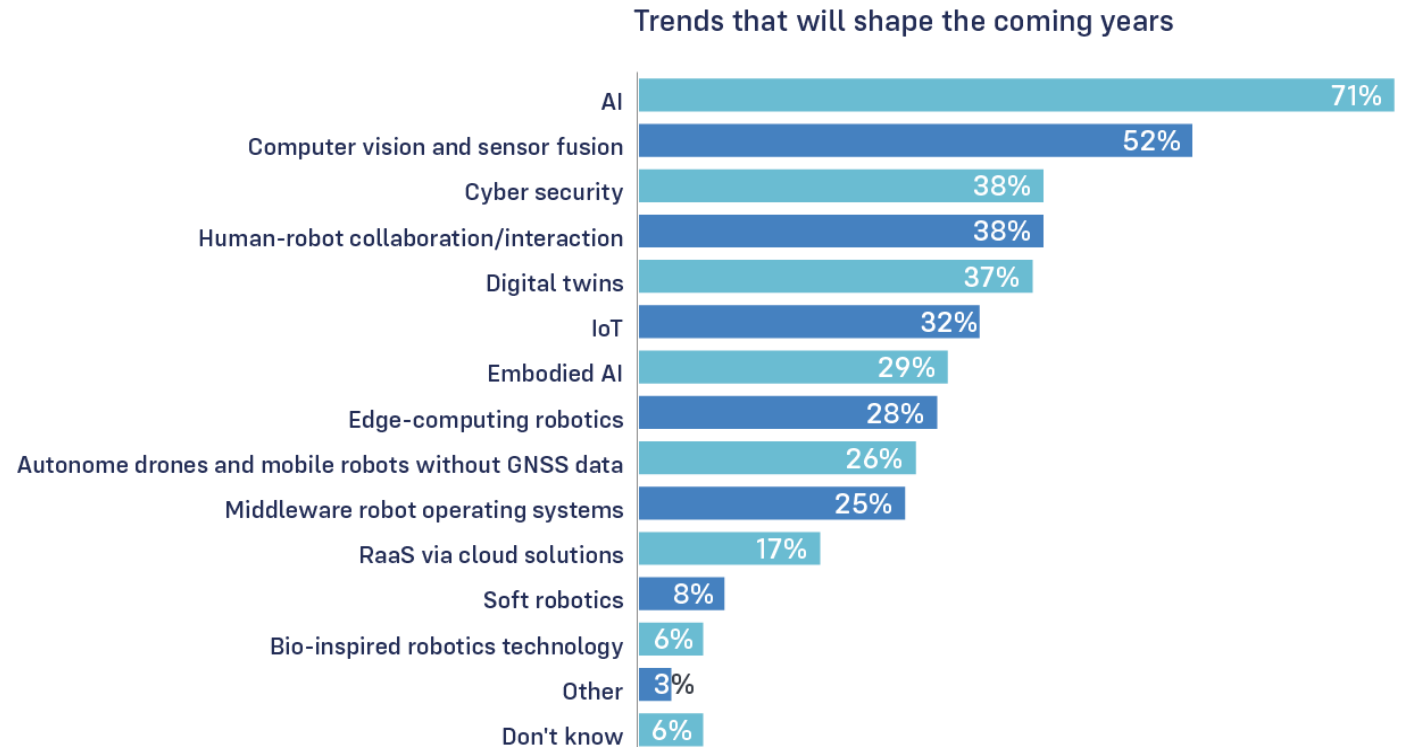
Have developed and launched new technological products in the past year



Technologies shaping future robotics development

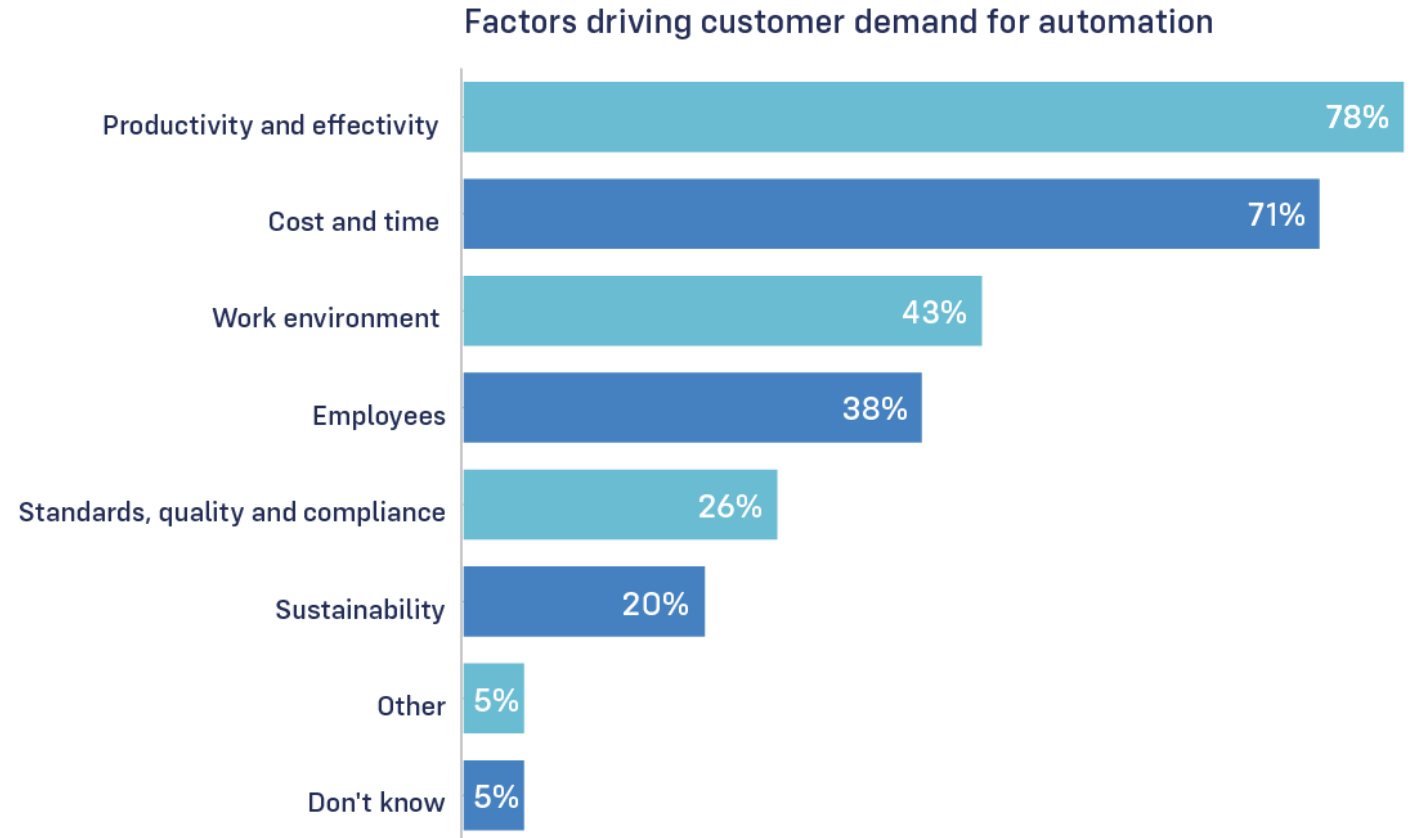
Danish robotics, automation and drone solutions say two technologies will dominate development within robotics and drone solutions in the coming years.

Artificial intelligence is by far the main driver for future development followed by computer vision and sensor fusion.



Productivity driving demand for automation

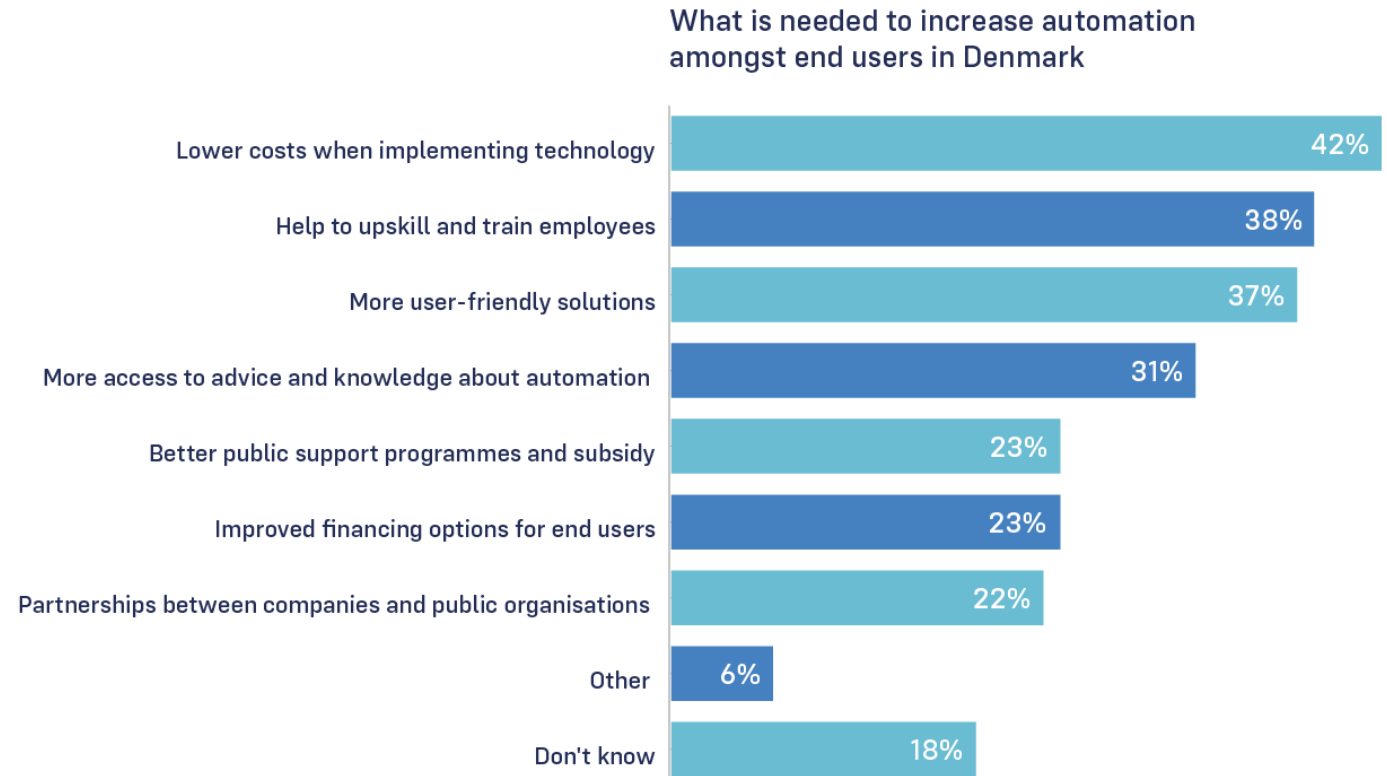
Companies say that customer demand for automation solutions is primarily driven by a desire to increase productivity and effectivity, as well as a desire to optimise use of cost and time.

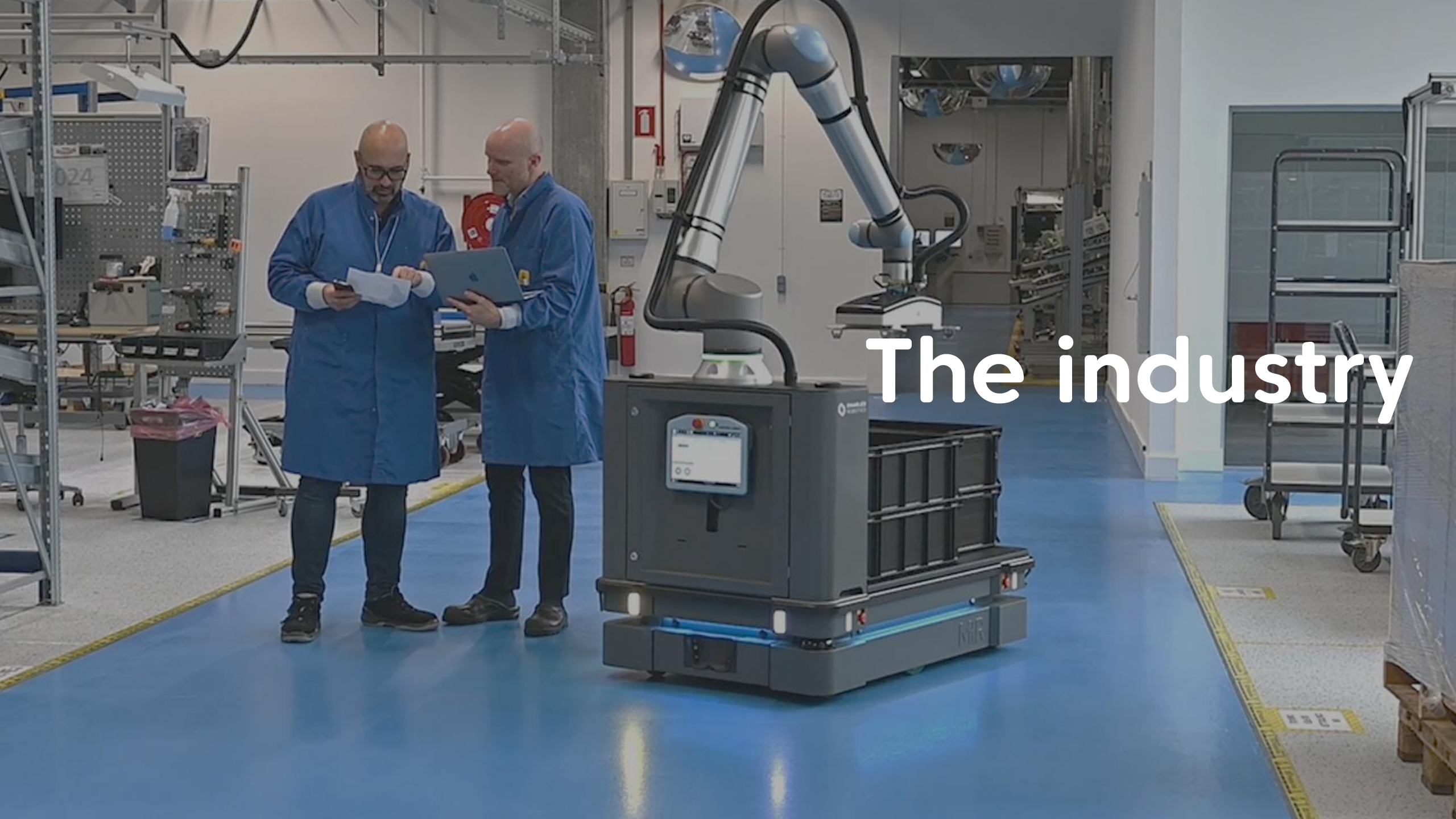


How to increase automation adoption in Denmark

There is still strong potential for end user companies to automate more than they do today. So, what can support this transition?

Companies point to a range of factors such as lower costs, employee upskilling and more user-friendly solutions.





The industry

Changing the way we live

Danish robotic solutions are changing the way we live and work – providing solutions for a wide range of sectors.



Agriculture & food



Construction & building



Defence & security



Environment



Energy



Health & welfare



Logistics & transport



Manufacturing

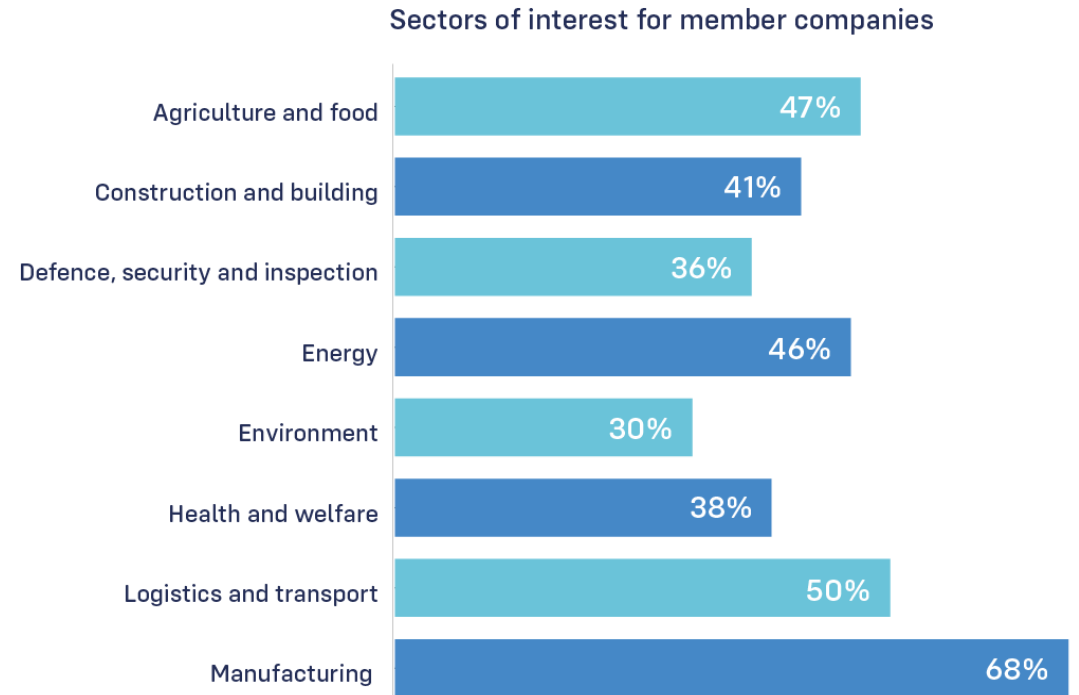
Providing automation solutions to many sectors

Danish robotics, automation and drone solutions are by no means confined to industrial manufacturing.

Today, these technologies are bringing benefits to a wide range of sectors such as agriculture, construction, healthcare, logistics and security.

Manufacturing continues to be the most important end-user sector of interest for Odense Robotics' company members.

Companies also cite a wide range of other sectors as relevant such as agriculture, construction, healthcare, logistics and security.



Regional strongholds and thriving ecosystem

Denmark's robotics, automation and drone industry is home to around 600 companies, supported by a strong ecosystem.

Northern Jutland

86 headquarters / 152 workplaces

Central Jutland

95 headquarters / 191 workplaces

Southern Jutland

77 headquarters / 160 workplaces

Funen

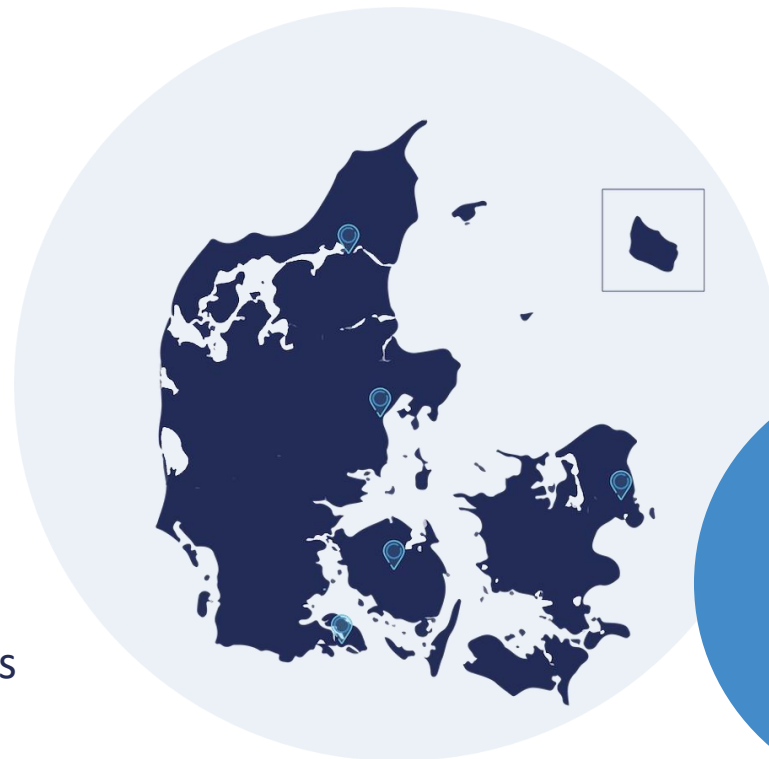
161 headquarters / 216 workplaces

Greater Copenhagen

156 headquarters / 219 workplaces

Zealand

30 headquarters / 68 workplaces



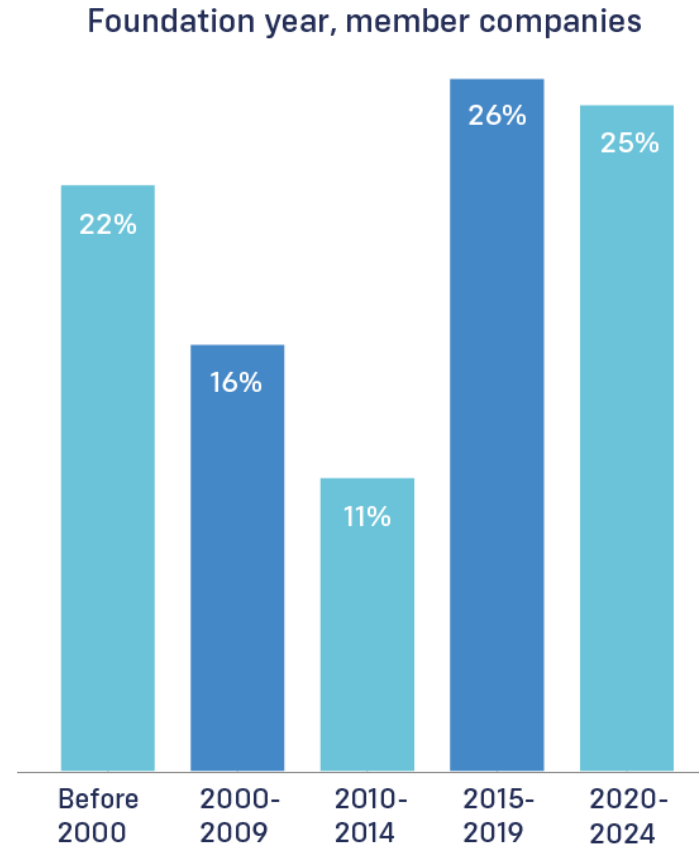
605
companies

High concentration of startups and scaleups

Denmark's robotics industry is characterised by a high proportion of startups and scaleups. This hotbed of innovation bodes well for the industry's future development.

Odense Robotics' company members established since 2020

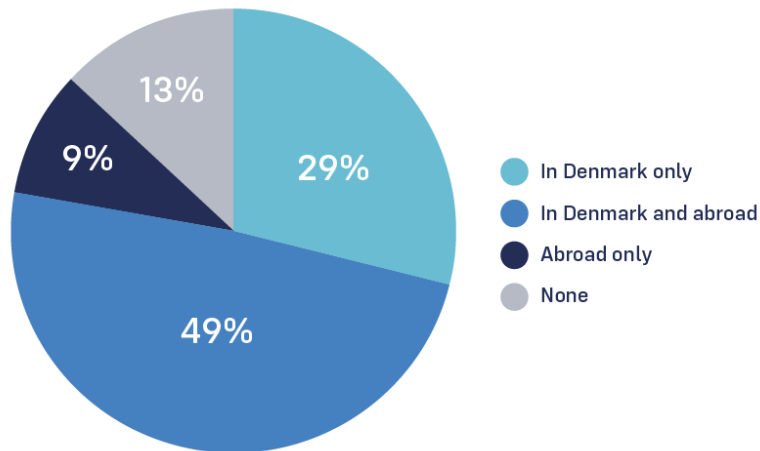
25%



Collaboration is in our DNA

Collaboration thrives in the cluster – and plays a key role in the industry's ability to innovate and commercialise new technologies.

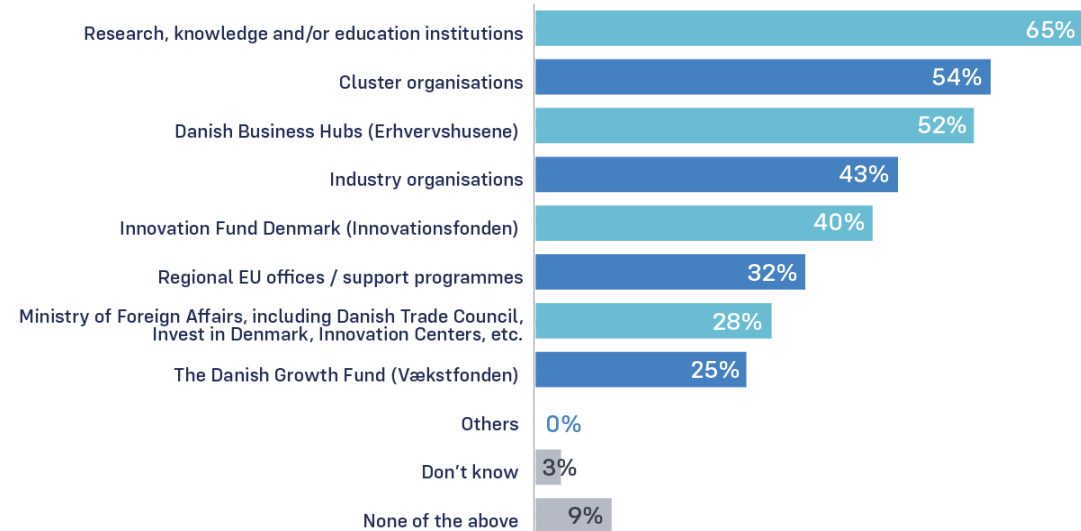
Collaboration with other robotics companies



Companies collaborating
with other robotics companies

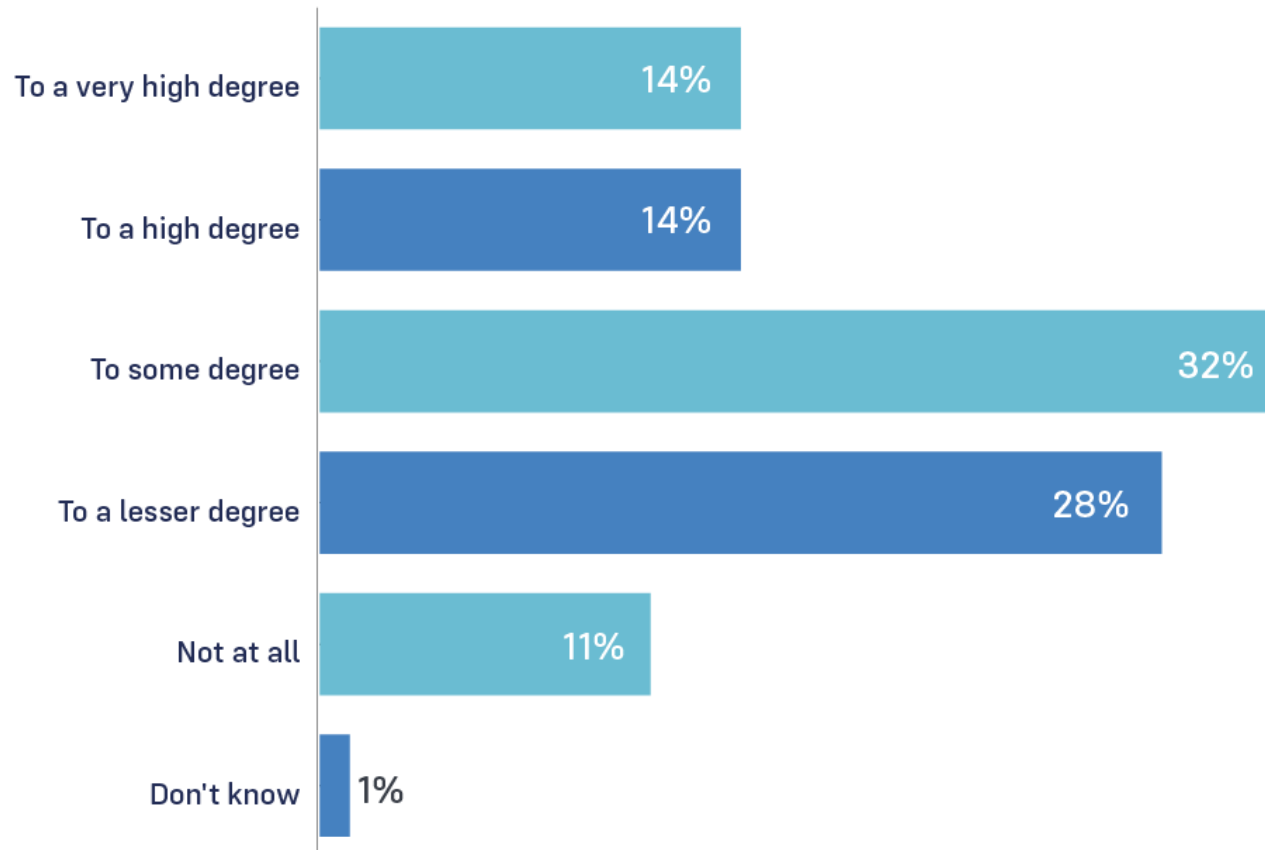
87%

Other collaboration partners



88% actively work with green transition

Companies working with their own
green transition and/or circular economy



88%

**work actively with
green transition**



People

Strong workforce in Denmark

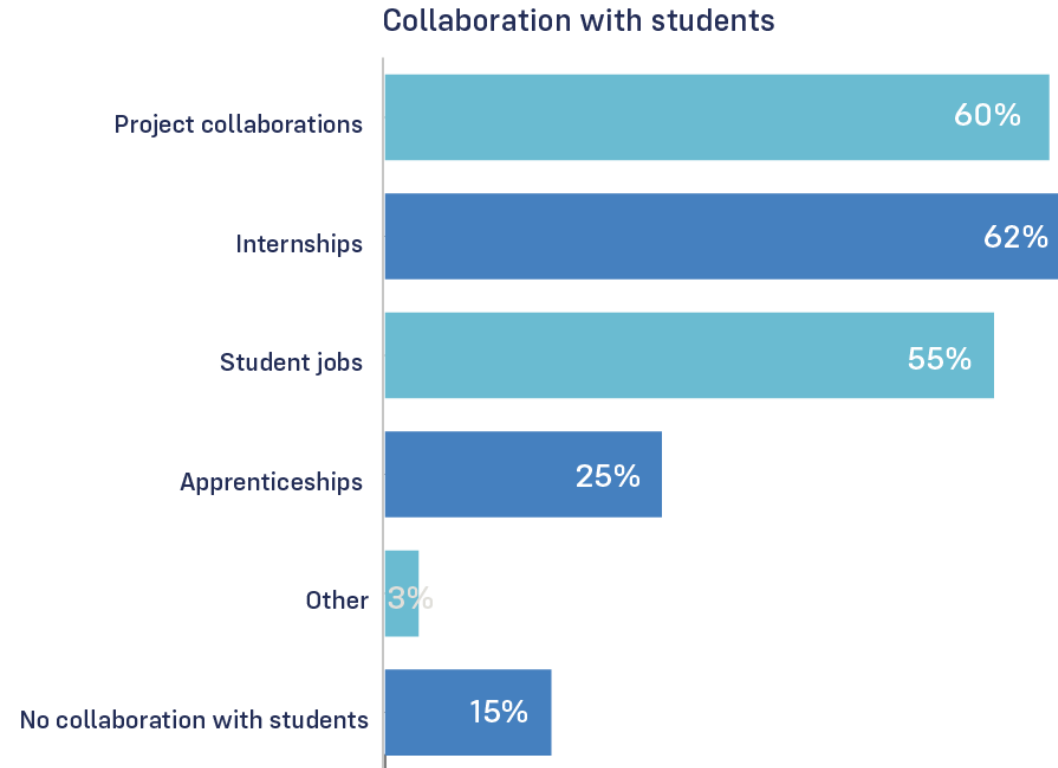
Denmark's robotics industry employs a total of 19,500 people – 14,900 in Denmark and 4,600 abroad.



Collaborating with students to secure talent

Danish robotics, automation and drone companies have a high degree of collaboration with students as part of their ongoing efforts to secure talent.

Collaboration spans primarily project collaborations, internships and student jobs.

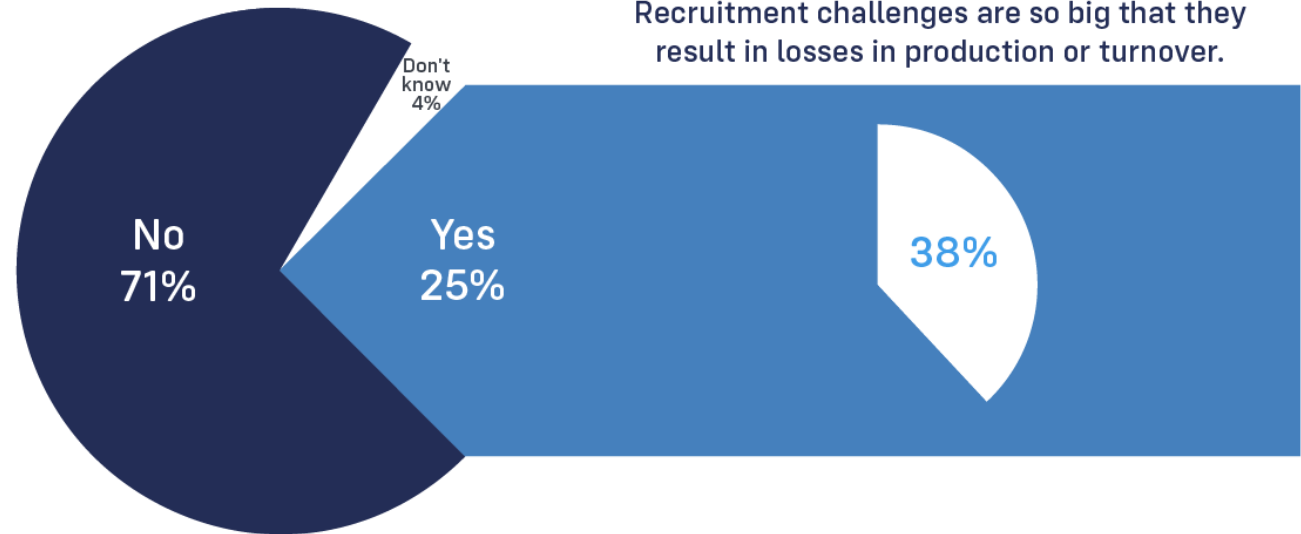


Recruitment challenges

25% of Danish robotics companies had to abandon filling a vacant position last year due to a lack of qualified applicants.

Among these, 38% state that their recruitment challenges are significant enough to result in production or revenue losses.

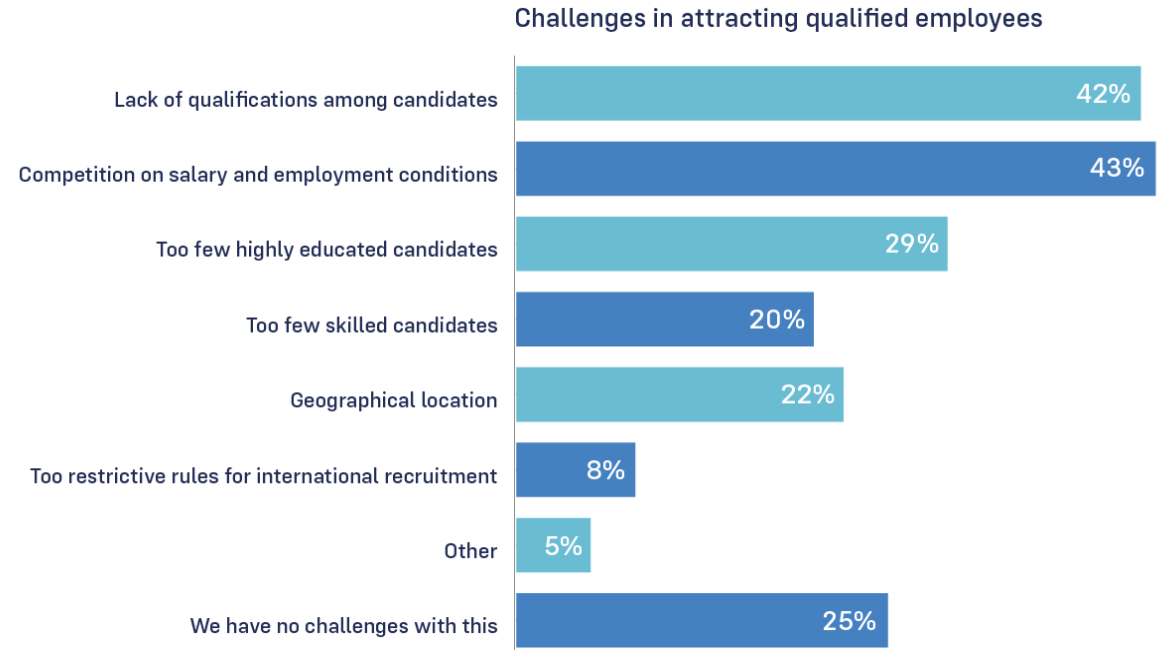
Companies that had to give up recruiting for an open position within the past 12 months due to a lack of qualified applicants



Factors underlying recruitment challenges

There are many factors contributing to companies' challenges, however two stand out.

Companies say challenges derive primarily from competition on salary and employment conditions, and a lack of qualifications among candidates.



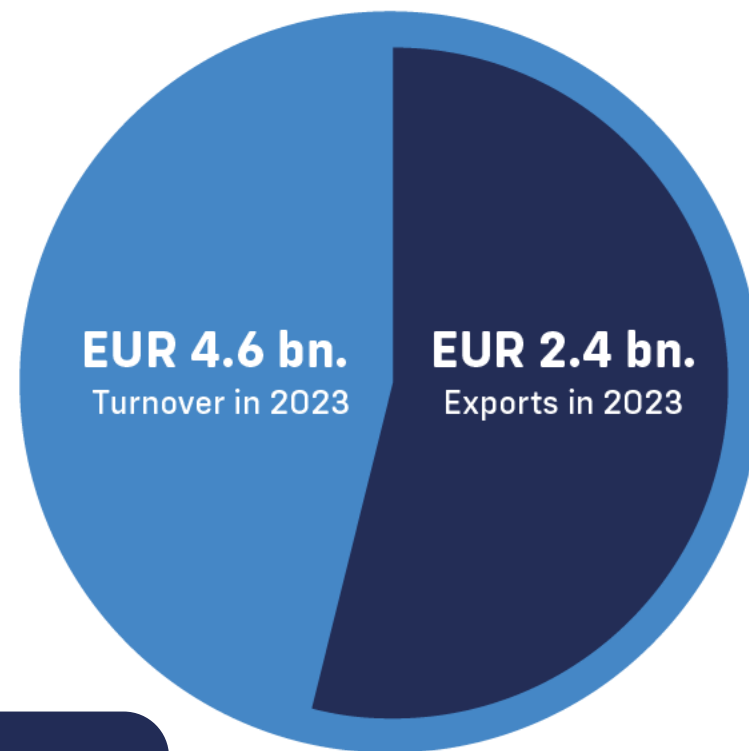
Growth



Stable growth with high share of exports

The industry has demonstrated stable growth over recent years. The most recent financial figures show that the industry generated a turnover of EUR 4.6 billion (DKK 34.1 billion) in 2023, of which EUR 2.4 billion (DKK 18.2 billion) was derived from exports.

Turnover and exports



EUR 4.6 billion turnover in 2023

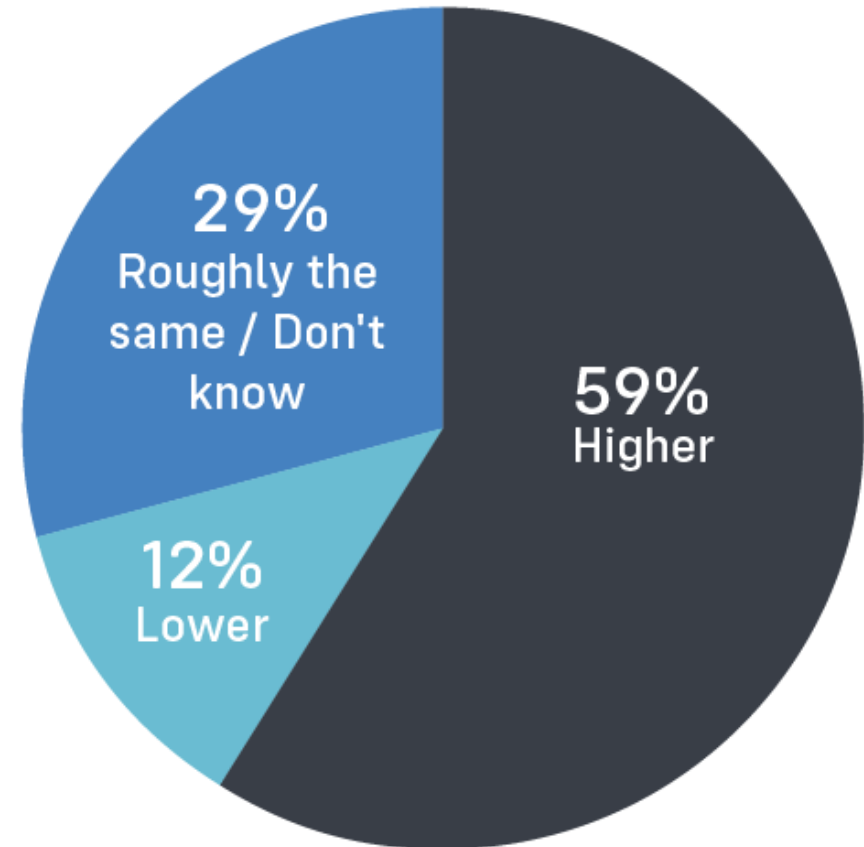
24% growth

compared to 2022

Turnover in 2024

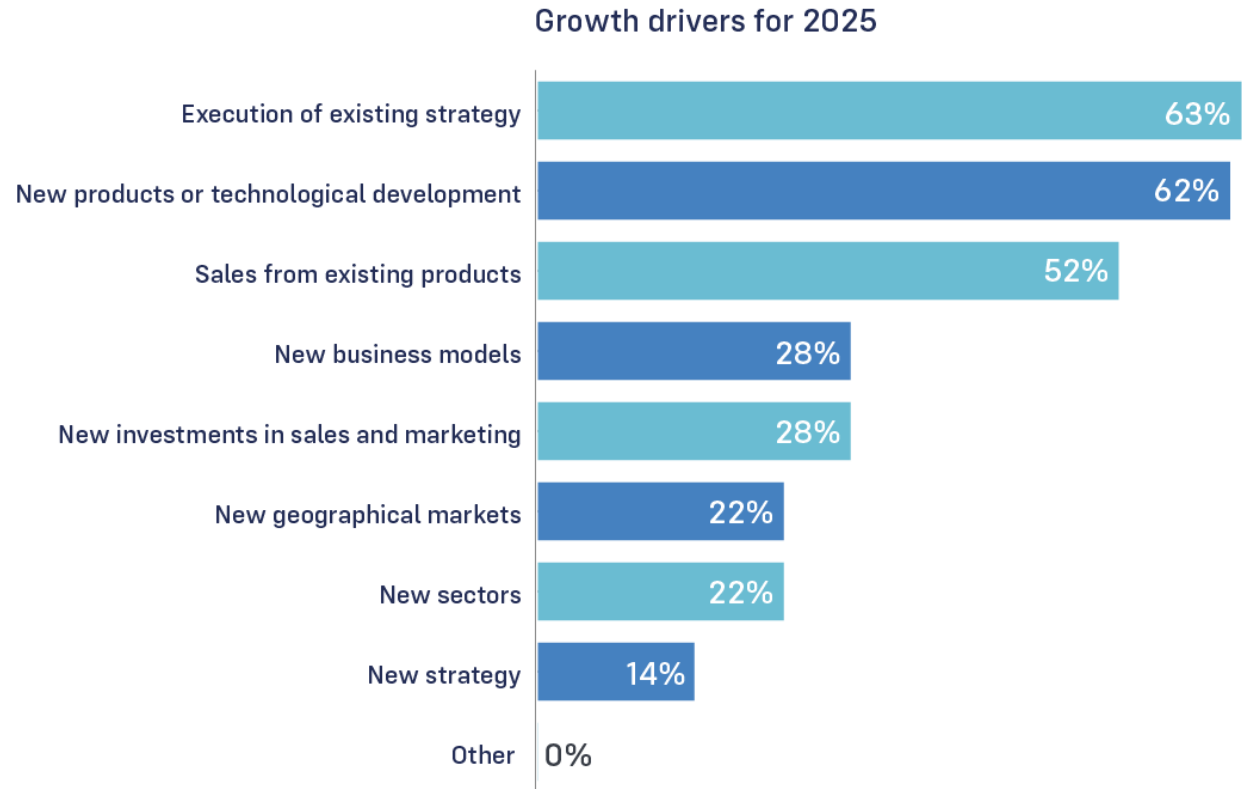
The large majority of Denmark's robotics, automation and drone companies expect to close 2024 with a higher turnover than the previous year.

Expected net turnover in 2024
compared to previous year



Growth drivers for 2025

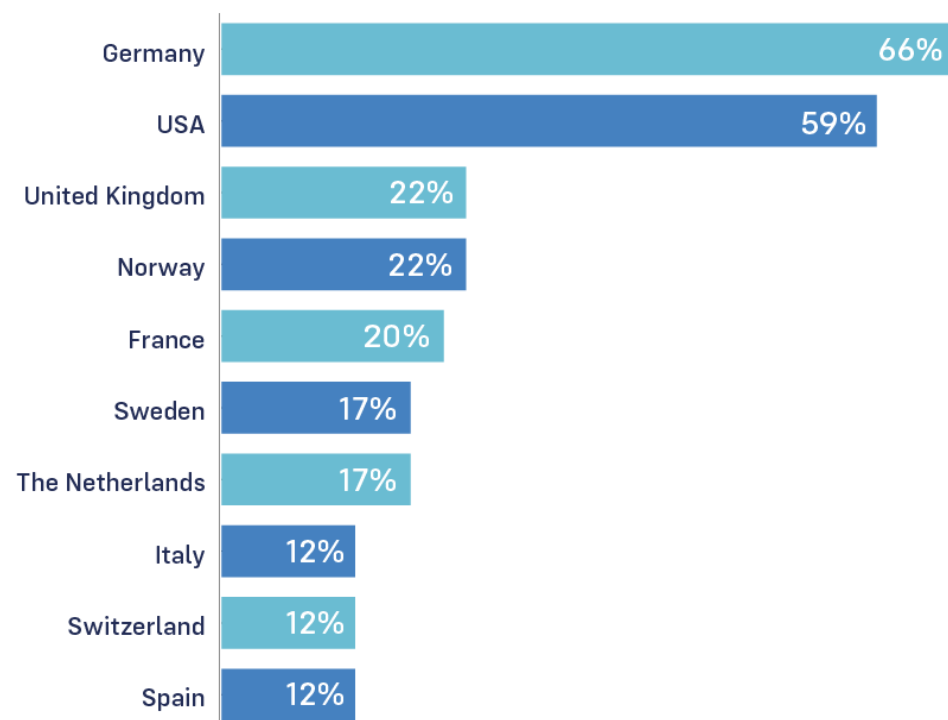
When asked what will drive growth in 2025, companies point to two main factors: execution of existing strategy, and new products or technological development.



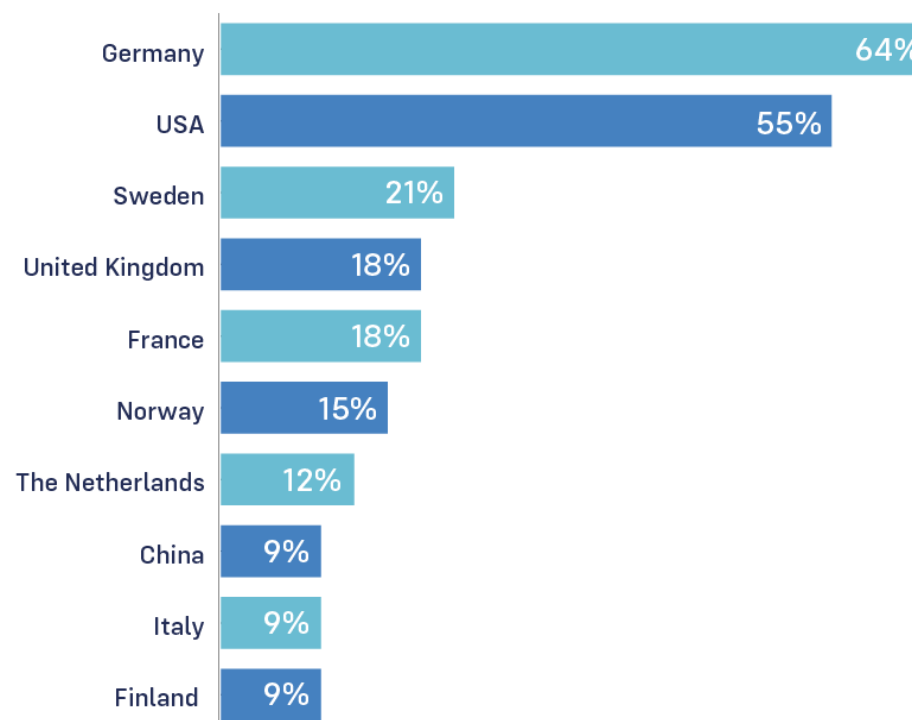
Key export markets now and in the future

Germany and USA remain the most important export markets for Denmark's robotics, automation and drone industry.

Most important export markets today



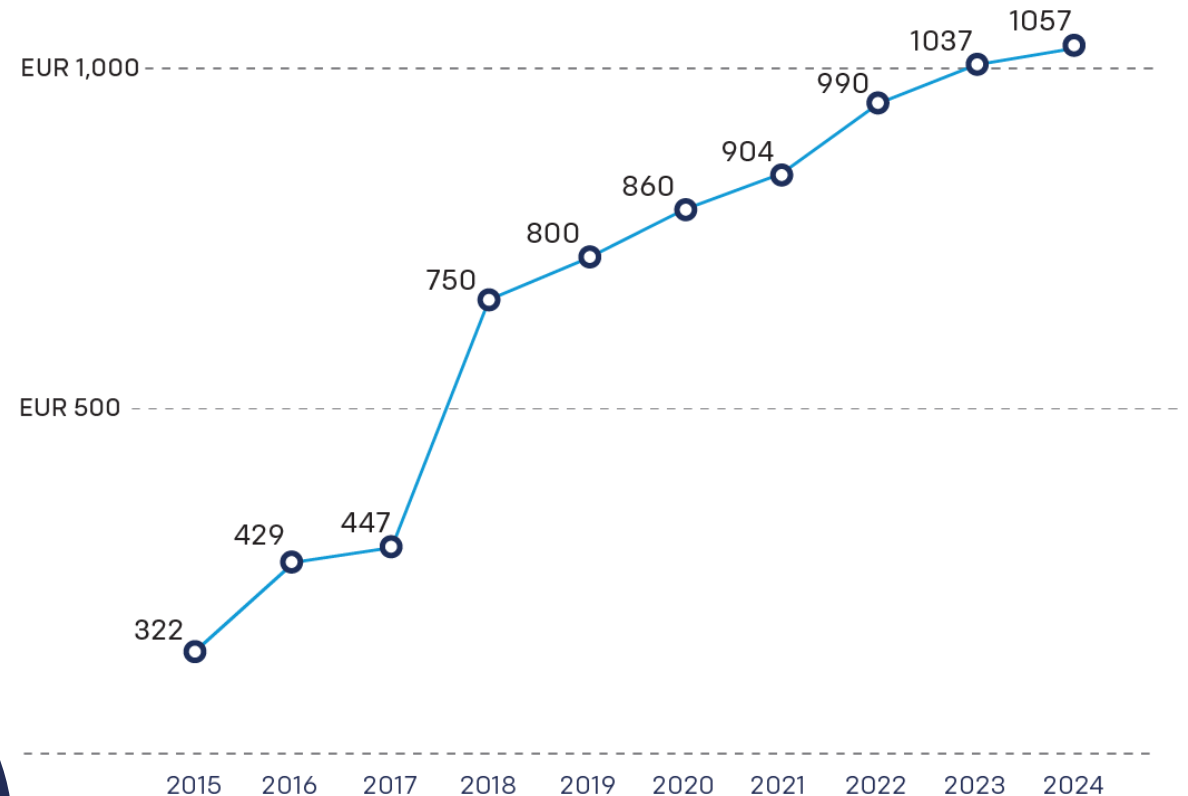
Most important export markets in 3 years



Investment landscape

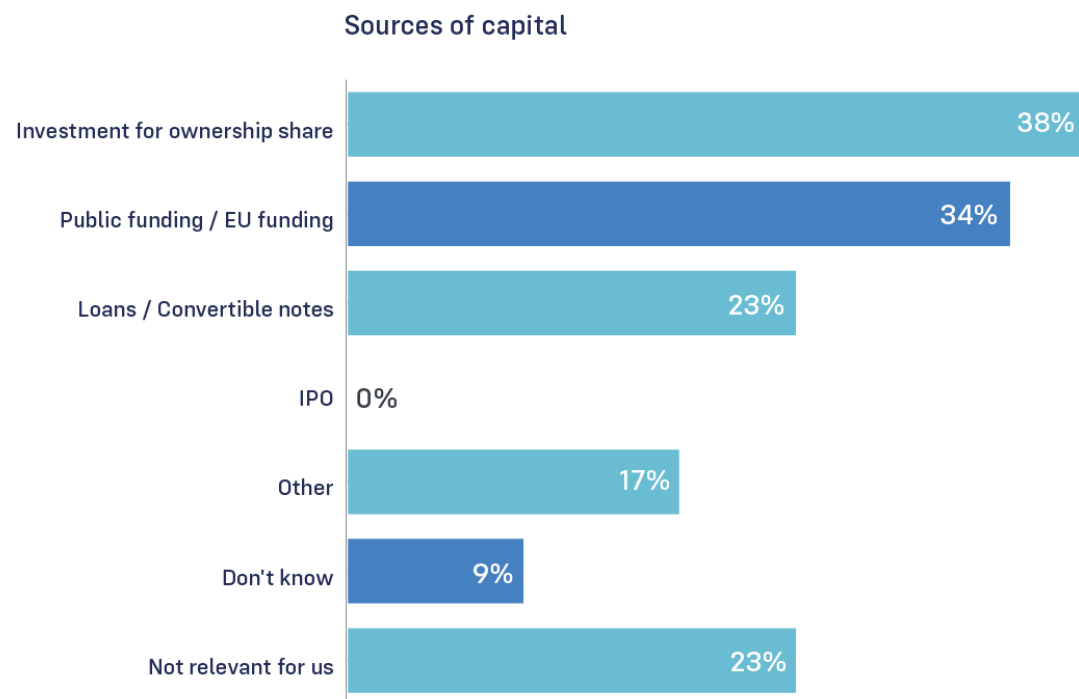
2024 was marked by significant exits and difficulties in raising capital. Market unpredictability and geopolitical factors have created both opportunities and a growing tendency toward risk-averse investing. Despite challenges, Danish robotics technology remains attractive.

**EUR 1+
billion
invested in
companies**



Sources of capital

Direct investments continue to be the primary source of capital for companies closely followed by public funding or EU support programmes.



38%
source capital
from investors

Growth barriers

Resources, awareness and recruitment remain the top growth barriers for Danish robotics, automation and drone companies.

81%

lack of time, resources, and funding
for innovation and product development

81%

raising awareness amongst end users about the
benefits of solutions / technologies

74%

lack of qualified workforce

Growth barriers

Lack of time, resources and finances for innovation and product development



Raising awareness amongst end users about the benefits of solutions/technologies



Lack of qualified workforce



Lack of capital



Commercial limitations due to regulations and/or compliance



Supply chain issues, including component shortages



Access to export markets



 Huge problem  Big problem  Small problem  Not a problem  Don't know/don't want to answer

Methods



Scope

This report examines all companies in Denmark with a Danish CVR number that are identified by Odense Robotics as having a relevant focus in the industry within robotics, automation and/or drone technologies. This individual mapping is necessary because no industry code exists. Companies can either be a member of Odense Robotics or identified as relevant through desk research by examining each individual company's share of turnover in the industry as well as the extent to which the company has a strategic focus, dedicated technologies, and high-tech service with various application areas.

Company definitions

Odense Robotics' definition of the industry covers the following six types of companies:

- **Producer:** Companies that develop and manufacture solutions based on robotic, automation and drone technologies.
- **System integrator:** Companies that bring together various robotic, automation and drone solutions from producers and distributors in one integrated system that can be implemented at the end user. System integrators can also be responsible for installation.
- **Service provider:** Companies that provide robotic services or solutions to end users.
- **Component supplier:** Companies developing and producing advanced value-based subsystems and components for the robot-, automation and drone industry, such as software components, electrical drivetrains, machine construction, sensors as well as vision technologies and advanced drone operators.
- **Consultancy:** Companies that advise producers, distributors, system integrators and component suppliers about their development and manufacturing, and/or advise advanced end users about implementing and deploying robotics technologies.
- **Distributor:** Companies that distribute, sell and service robotic solutions typically via an affiliate.

Data sources

The report's data is based on quantitative analysis from the following sources:

- Odense Robotics' master data on members.
- Odense Robotics' master data on other companies in the industry.
- Odense Robotics' annual survey of its member companies. The survey data is gathered and examined by the market research agency Wilke A/S. The latest survey was conducted in the period 7-29 January 2025. The result is considered to be representative of the cluster as a whole because responses are evenly spread in terms of e.g. company size and type.
- Statistics Denmark. This data dates back one year and relates to companies that are active in the CVR register and established on 31.12.2023 or before. All data from Statistics Denmark is from end 2023 except from the number of employees abroad, which dates from end 2022.
- Odense SEED & VENTURE's master data and data from Dealroom.co.

Use of material

Odense Robotics would like to thank all companies that participated in this survey for their valuable contribution to this report. Please state the source when using or referring to the material in this report. This report is available on Odense Robotics' website.

Methods



Calculation methods

Some companies are fully dedicated to robotics, automation and/or drone technologies, while others are only partially dedicated to the field. In order to provide the most accurate picture possible of the industry, Odense Robotics has weighted all identified companies according to an estimation of how big a share of the company's turnover is derived from the industry. This weighting is applied to data from Statistics Denmark. This ensures that only the part of the activity concerning robotics, automation and drones is included. Some very big companies are analysed individually based on publicly available figures rather than data from Statistics Denmark.

The following is based on data from Statistics Denmark:

- Number of headquarters and workplaces
- Geographical location
- Year established
- Employees in Denmark and abroad
- Turnover and exports.

The following is based on Odense Robotics' master data on member companies:

- Sectors of interest for member companies.

Investment in Danish robotic, automation and drone companies is calculated by Odense SEED & VENTURE and includes figures from Dealroom.co. The figure for investments in companies since 2015 is an accumulated figure based on investments made in Funen-based companies until 2019 and national figures from 2020. Additional investments can have taken place without the knowledge of Odense SEED & VENTURE.

The following is based solely on data from Odense Robotics' company member survey:

- Recruitment challenges
- Challenges recruiting qualified employees
- Collaboration with other companies and partners
- Exports today and in the future
- Most important export markets
- Expected net turnover in 2024 compared to previous year
- Growth drivers for 2025
- Growth barriers
- Sources of capital
- Companies working with their own green transition and/or circular economy
- Have developed and launched new technological products in the past year
- Trends that will shape the coming years
- Factors driving customer demand for automation
- What is needed to increase automation amongst end users in Denmark

ABOUT ODENSE ROBOTICS

**We help robotics companies
grow and innovate**



Networks
Connecting professionals for insights, collaboration, and growth.



Innovation
Driving new solutions through partnerships and funding.



Knowledge & Sparring
Providing businesses with expert insights and strategic support to drive innovation and growth.



Robotic, automation and drone companies

Companies ready to automate

Universities, Research & Technology Organisations, other clusters, public sectors

Connecting the ecosystem

Connecting for impact



Visibility
Strengthening industry influence and boosting brand exposure.



Matchmaking
Linking robotics companies with customers and partners.



Start up
Accelerating new ventures with guidance, funding, and support.



People
Attracting top talent and developing future-ready teams.



Internationalization
Helping companies expand and succeed globally.

Accelerate growth

Nurture people

Drive innovation

Forge partnerships

Danish robotics can improve our world.
We help make it happen

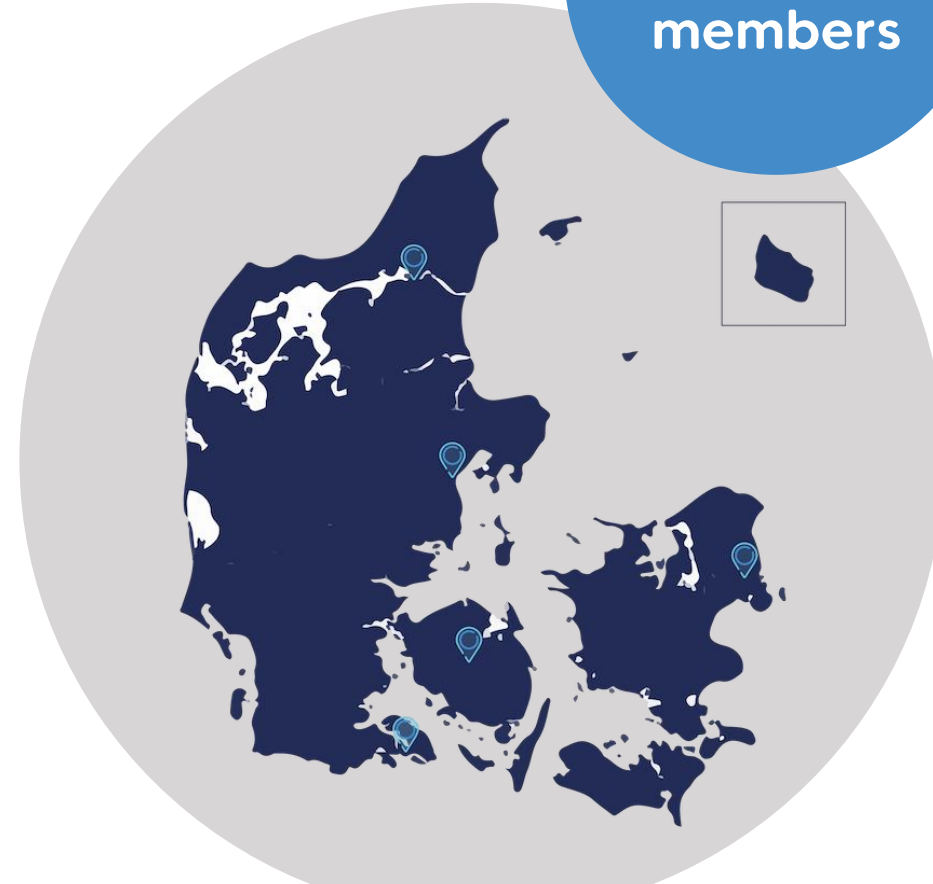
Denmark's robotics cluster

Odense Robotics is Denmark's national cluster for robot, automation, and drone technology. Our purpose is to improve the world with Danish robotics solutions.

We help Danish robotics, automation and drone companies develop innovative products and technologies, strengthen their foundation for growth, gain industry insights, forge valuable relations and increase their visibility.

We do this through projects, networks, and activities – often in close collaboration with our many knowledge partners. Odense Robotics has hubs in Northern Jutland, Central Jutland, Zealand, and Southern Jutland and is headquartered in Odense on Funen.

350+
members



**Offices across
Denmark**

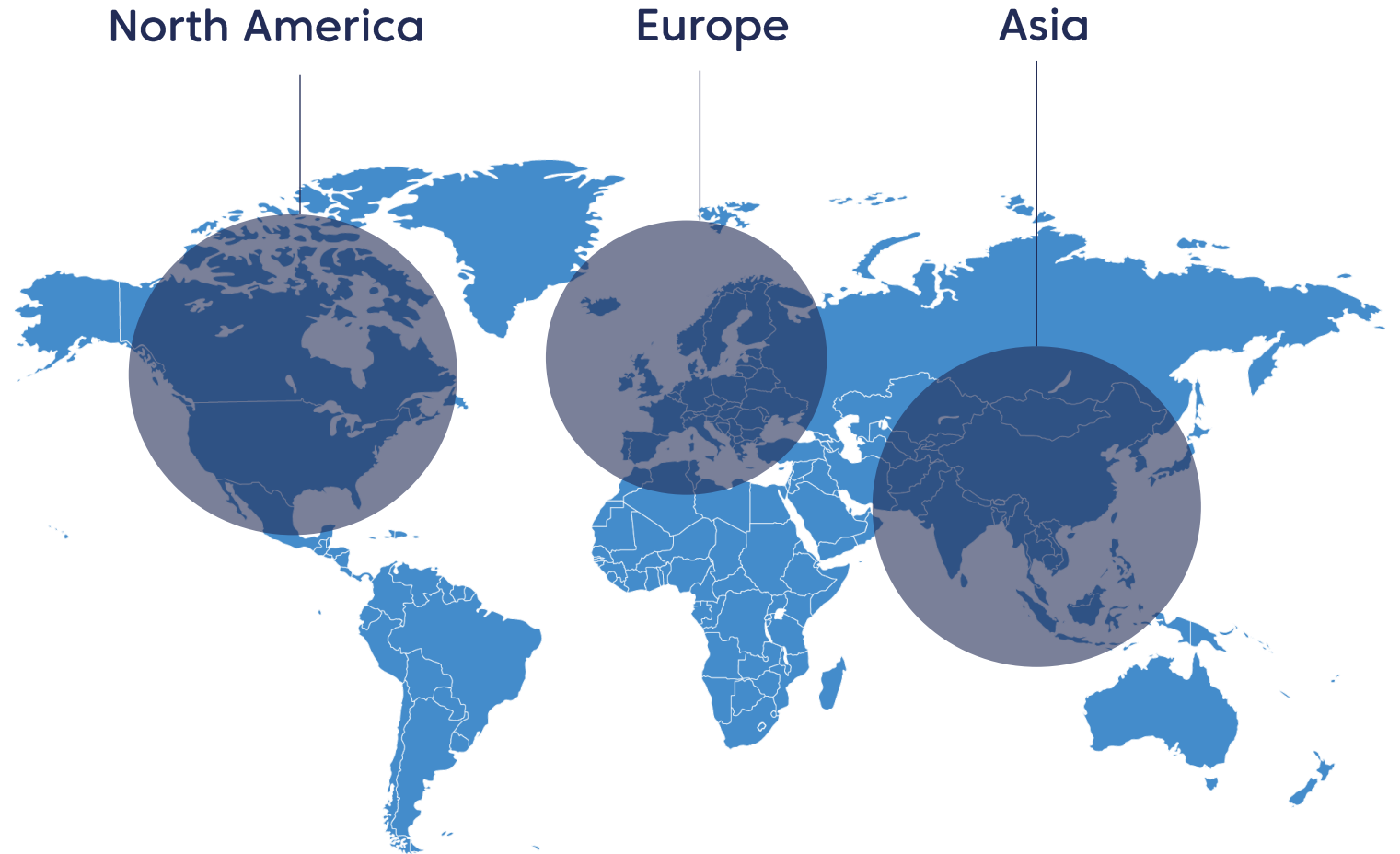
We bring Danish robotics to the world

Odense Robotics showcases Danish robotics solutions, companies, and the ecosystem to decision-makers, end-users and talent globally.

We do this through international strategic partnerships

delegation visits, expos and international collaboration.

We also welcome international delegations to Denmark to meet robotics solution providers and tour the ecosystem.



INSIGHT REPORT 2025

Member directory 2025

Member directory 2025

NORTHERN JUTLAND

ADDING ENGINEERING A/S
addingengineering.dk



Ahlsell Danmark A/S
sanistaal.com



Akson Robotics ApS
akson-robotics.dk



Ambolt AI
ambolt.io



AR-Simply ApS
ar-simply.com



BALLUFF ApS
balluff.com



BILA A/S
bila.dk



BIOX ApS
bioxgroup.dk



Conformitech Aps
conformitech.dk



DAMGAARD AUTOMATIK A/S
damgaard-automatik.dk



Erhverv Norddanmark
erhvervnorddanmark.dk



FLAIRMO ApS
flairmo.dk



HEXASTATE
hexastate.com



IDOC A/S
idoc.as



INROPA A/S
inropa.com



INTELLIGENT SYSTEMS A/S
intelligentsystems.dk



IT-AI Solutions ApS
it-ai-solutions.com



KVEJBORG ApS
kvejborg.dk



Körber Supply Chain DK A/S
koerber-supplychain.com



Life Science Robotics ApS
lifescience-robotics.com



LT Automation Aalborg A/S
lt-automation.dk



MAREL SALMON A/S
marel.com



Mariendal El-Teknik A/S
mariendal.dk



Move2x ApS
move2x.dk



MyDefence A/S
mydefence.dk



PARTDESIGN ApS
partdesign.dk



PolyBot I/S
polybot.co



PRECISION TECHNIC
DEFENCE A/S
ptdefence.com



RARS ApS
rars.dk



Robotto Co ApS
robotto.ai



SigmaNet ApS
sigmanet.dk



SOFT & TEKNIK A/S
softogteknik.dk



SPKTRA ApS
spktra.com



SVEJSEMASKINEFABRIKKEN
MIGATRONIC A/S
migatronik.dk



Systemteknik
systemteknik.dk



Talmo ApS
talmo.dk



TASKLET FACTORY ApS
taskletfactory.com



TECHCOLLEGE
techcollege.dk



TECHNICON A/S
technicon.dk



The Gripper Company ApS
thegrippercompany.com



TRECO A/S
treco.dk



TRIFORK A/S
trifork.com



Turf Tank ApS
turf-tank.com



Xtel Wireless ApS
xtellio.com



Aalborg Universitet
aau.dk



CENTRAL JUTLAND

3DVerkstan Danmark ApS
3dverkstan.dk



4Tech Robotics ApS
toolchanger.eu



AUH Skejby
en.auh.dk



Capra Robotics ApS
capra.ooo



CLEVR Engineering ApS
clevr.dk



Cobot Finance A/S
cobotfinance.com



CONPLEKS INNOVATION ApS
conpleks.com



DANSK INGENIØRSERVICE A/S
d-i-s.dk



Member directory 2025

Drone Systems ApS
dronesystems.dk



Dropla Tech ApS
dropla.tech



EKTOS A/S
ektos.net



FASTSEWN
fastsewn.com



FLEXITECHS A/S
flexitechs.dk



Hecto Drone ApS
hectodrone.com



Heibjerg ApS
heibjerg.com



Kasparium ApS
kasparium.com



KENDA Europe A/S
starco.com



KJÆRGAARD A/S
kia.dk



KUKA Denmark
kuka.dk



lpmathiasen



MACH-TECH A/S
machtech.dk



Mercantec
mercantec.dk



MG5

mpeople A/S
mpeople.dk



Nordic Radar Solutions ApS
nordicradarsolutions.com



NTO A/S
nto.dk



O-Robotics ApS
O-Robotics.com



PREVAS A/S
prevas.dk



Robots and Cobots ApS
robots-cobots.com



ROBOTWORKSHOP
robotworkshop.dk



Scandimatic ApS
scandimatic.dk



Schmidt Innovation
sinno.dk



Scout Robotics ApS
scoutrobotics.dk



Seginova ApS
seginova.com



SEQTOR ApS
seqtor.com



SKYTEM SURVEYS ApS
skytem.com



SMC DANMARK A/S
smc.eu/da-dk



TERMA A/S
terma.com



TinyMobileRobots ApS
tinymobilerobots.com



Uniwelco ApS
uniwelco.com/da



Upteko ApS
upteko.com



Ventus Wind Services ApS
ventus.group



Yaskawa Danmark
yaskawa.dk



Østjyllands Politi, Hovedstation
og Rigspolitiet
politi.dk



Aarhus Universitet
au.dk



SOUTHERN JUTLAND

3Dtwix
3dtwix.com



AGRAMKOW FLUID SYSTEMS A/S
agramkow.com



Alfa 3D print
alfa3dprint.dk



Alsmatik A/S
alsmatik.dk



BECKHOFF AUTOMATION ApS
beckhoff.com/da-dk



Billund Erhverv
billunderhverv.dk



Bureau Veritas
bureauveritas.dk



Business Esbjerg
businessesbjerg.com



Business Aabenraa
businessaabenraa.com



CCM ELECTRONIC ENGINEERING ApS
ccm-ee.dk/da



Member directory 2025

DANAUTOMATION ApS
danautomation.dk



HANNEMANN ENGINEERING ApS
hannemann-eng.dk



NamoDan ApS
namodan.com



SCANDINAVIAN AVIONICS A/S
scanav.com



TRIMATIC AUTOMATION A/S
trimatic.dk



Danfoss Drives
danfoss.com



HARTING ApS
harting.dk



Padborg Transportcenter
padborgtransportcenter.dk



Signode Denmark ApS
signode.com



Tønder Erhvervsråd
toendererhvervsraad.dk



DESIGNSKOLEN KOLDING
designskolenkolding.dk



HeroCamper ApS
robot-trolley.com



PAJ EMS ApS
paj-group.com



Staghoj ApS
staghoj.com



Udviklingsråd
Sønderjylland
soenderjylland.dk



Det Syddanske EU-kontor
southdenmark.be



Holtec Automatic A/S
holtec.dk



PEHAMA PRODUCTIONS A/S
pehama.dk



STILL DANMARK A/S
still.dk



Viden om Data
videnscenterportalen.dk



Drone Eksperten ApS
drone-eksperten.dk



IBA Erhvervsakademi Kolding S/I
iba.dk



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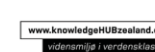
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Odense Robotics is Denmark's national cluster for robot, automation and drone technology. Our purpose is to improve the world with Danish robotics solutions.

We help Danish robotics, automation and drone companies develop innovative products and technologies, strengthen their foundation for growth, gain industry insights, forge valuable relations and increase their visibility. We do this through projects, networks and activities – often in close collaboration with our many knowledge partners.

We bring Danish robotics solutions closer to end markets, both nationally and internationally, and increase the global visibility of Denmark's robotics industry through strong partnerships, promotional activities, and events.

Odense Robotics has hubs in Northern Jutland, Central Jutland, Zealand and Southern Jutland and is headquartered in Odense on Funen.

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