The Netherlands Defense Sector - Market Opportunities and Entry Strategies, Analyses and Forecasts to 2015

Description:
Synopsis
- Top level overview of the Netherlands defense industry
- A breakdown of the Netherlands defense industry by spend pattern valued from 2006 through 2010 and forecasted from 2011 through 2015
- A breakdown of the markets by segment valued from 2006 through 2010 and forecasted from 2011 through 2015
- Details of top companies active across the Netherlands defense industry
- Emerging trends and opportunities in the Netherlands defense industry in the last 12 months

Summary
This report offers insights into the market opportunities and entry strategies adopted by foreign OEMs (original equipment manufacturers) to gain a market share in the Netherlands defense industry. In particular, it offers in-depth analysis of the following:

- Market opportunity and attractiveness: detailed analysis of the current industry size and growth expectations during 2011–2015, including highlights of the key growth stimulators. It also benchmarks the industry against key global markets and provides detailed understanding of emerging opportunities in specific areas.
- Procurement dynamics: trend analysis of imports and exports, together with its implications and impact on the Netherlands defense industry.
- Industry structure: five forces analysis to identify various power centers in the industry and how these are likely to develop in the future.
- Market entry strategy: analysis of possible ways to enter the market, together with detailed descriptions of how existing players have entered the market, including key contracts, alliances, and strategic initiatives.
- Competitive landscape and strategic insights: analysis of competitive landscape of the defense industry in the Netherlands. 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.
- Business environment and country risk: a range of drivers at country level, assessing business environment and country risk. It covers historical and forecast values for a range of indicators, evaluating business confidence, economic performance, infrastructure quality and availability, labor force, demographics, and political and social risk.

Scope
Analysis of Defense industry market size from 2006 through 2010 and forecasts till 2015
Analysis of defense budget allocation
Benchmarking with key global markets
Market opportunities
Defense procurement dynamics
Industry dynamics
Market entry strategy
Competitive landscape and strategic insights
Business environment and country risk

Reasons to buy
- Gain insight into the Netherlands defense industry with current, historic and forecast market values
- Get insight on market opportunity and attractiveness
- Get insight on industry procurement dynamics
- Gain insight on industry structure
- Gain insight into the regulations governing the Netherlands defense industry and the potential market entry strategies with an expert analysis of the competitive structure
- Identify top companies of the Netherlands defense industry along with profiles of all those companies

Key Highlights
Netherlands defense budget is expected to reach US$10.9 billion by 2015
The defense expenditure of the Netherlands recorded a CAGR of 5.33% during the review period and stood at US$12.2 billion in 2009. During the forecast period, the high fiscal debt of the country, along with the financial constraints of the Ministry of Defense (MOD), is expected to cause the defense budget to decline at a CARC of -0.63%, from US$11.3 billion in 2010 to US$10.9 billion in 2015. The defense budget is primarily driven by peacekeeping operations, assistance for the internal defense forces of the country, and the modernization of the armed forces. The defense budget as a percentage of GDP is expected to decline from an average of 1.5% during review period to 1.3% in 2015.

Furthermore, the budget allocation for capital expenditure is expected to decline to an average of 26% during the forecast period, against an average of 29% in the review period. The capital expenditure on the army, which had the highest allocation of 36% during the review period, is expected to fall to an average of 25% in the forecast period. Moreover, the air force is expected to receive the largest allocation of an average of 33% of the total capital expenditure during the forecast period. The budget allocation for the army and navy, which averaged at 17% and 8% respectively in the review period, is expected to fall marginally to reach 16% and 7% respectively. The allocation for peacekeeping operations, which stood at an average of 4% during the review period, is expected to decline to 2% of the defense budget by 2015, due to government plans to withdraw its troops from Afghanistan.
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GDP per capita at current prices (US dollars)
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