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

Description: Product Synopsis

This report is the result of ICD Research/Strategic Defence Intelligence's extensive market and company research covering the Netherlands 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 Netherlands 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 Netherlands defense industry.

What is the current market landscape and what is changing?

The Netherlands MOD was allocated a budget of US$11.67 billion in 2011, which then decreased by 13.6% to reach US$10.09 billion. The defense budget recorded a CAGR of -4.19% during the review period and is expected to decrease at a CAGR of -0.08% during the forecast period. The country's defense expenditure is mainly driven by its active contribution in various peacekeeping missions, assistance for the domestic forces to maintain internal stability, and the modernization of its armed forces. During the forecast period, an average of 25.9% of the budget is expected to be allocated for capital expenditure, and the remainder for revenue expenditure.

What are the key drivers behind recent market changes?

Participation in peacekeeping missions, joint operations to ensure internal stability, and modernization will drive defense expenditure. The Netherlands actively participates in various peacekeeping missions around the world. As a member of the North Atlantic Treaty Organization (NATO), the United Nations (UN) and the European Union (EU), the country has made significant contributions to a number of missions, including the conflict in Afghanistan. Furthermore, the country has promoted the thoughts and practices to counter violent extremism (CVE) by hosting a number of events. These include hosting a multilateral symposium on good practices in the disengagement of violent extremists and an ongoing international dialogue on the creation of a CVE repository.

What makes this report unique and essential to read?

The Netherlands Defense Industry Market Opportunities and Entry Strategies, Analyses and Forecasts to 2017 provide 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 Netherlands 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 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.

Key Market Issues

The defense budget of the Netherlands, which was estimated at US$10.09 billion in 2012, recorded a CAGR of -4.19% during the review period. During the forecast period, the defense budget is expected to decrease at a CAGR of -0.08%, to reach US$9.87 billion by 2017. The predicted fall compared to the review period level in the defense budget is largely due to the high fiscal debt of the country and subsequent cuts to government spending. Although the country is still in the process of modernizing its defense forces, its defense procurement budget is unlikely to record any significant growth in the next five years, as investments will be made only in high priority categories.

The internal security expenditure of the Netherlands government was estimated at US$860 million for 2012. The Ministry of the Interior and Kingdom Relations represents the Ministry of Home Affairs of the Netherlands, and is responsible for the internal security of the country. In 2009, these institutions decentralized the internal security of the country and held all the municipalities responsible for fighting crime and domestic terrorism at the local level. The municipalities work with the police to fight against anti-social behavior and organized crime. The ministry allocated US$46.5 million for the police services in 2009, and allocated an additional US$21.8 million in 2010 to fight against organized crime, fraud, cybercrime and human trafficking.

The defense imports of the Netherlands increased in 2009 after falling in 2008. The rise in imports of defense equipment was due to the procurement of armored vehicles and missiles in 2009. In 2008 the import of weapons fell as the majority of defense procurements were frigates and upgrades to F-16 aircrafts, which the domestic defense industry is highly capable of supplying. After 2009 the imports again saw a decrease in imports. In the forecast period, defense imports are expected to decrease despite the MoDs plans to buy NH-90 helicopters, missile upgrades for F-16 aircraft, the upgrade of armored vehicles and infantry fighting vehicles, and the increased demand for precision-guided ammunition.

Key Highlights

The defense budget of the Netherlands, which was estimated at US$10.09 billion in 2012, recorded a CAGR of -4.19% during the review period. During the forecast period, the defense budget is expected to decrease at a CAGR of -0.08%, to reach US$9.87 billion by 2017. The predicted fall compared to the review period level in the defense budget is largely due to the high fiscal debt of the country and subsequent cuts to government spending. Although the country is still in the process of modernizing its defense forces, its defense procurement budget is unlikely to record any significant growth in the next five years, as investments will be made only in high priority categories.

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