

Belgium - Defense and Security: Procurement programs to drive expenditure (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

Belgium registered a high economic impact of violence and conflict score due to a series of terrorist attacks in 2016. Attacks in neighboring France raised concerns over domestic safety and security, leading to an increase in the business cost of terrorism scores. The country also has small army comprising 21,339 soldiers and ranks low in comparison to its peers in terms of defense expenditure. The aircraft and homeland security categories are the industry's key drivers.

MarketLine's premium reports provide a comprehensive overview of each market within a country's defense industry; benchmark key performance indicators against regional and global peers; review industry trends and drivers; evaluate the competitive landscape and innovation potential of singular markets; and conduct data-driven SWOT analysis to ascertain a structured assessment of the performance of each territory represented.

KEY HIGHLIGHTS

A decline in both capital and revenue spending negatively impacted total expenditure:

Belgium's revenue expenditure declined at a CAGR of -7.4%, falling from US\$2.7 billion in 2012 to US\$2.0 billion in 2016; attributed to economic instability. However, it

will post a forecast-period CAGR of 6.6% to return to US\$2.7 billion in 2021.

Capital expenditure declined at a CAGR of -6.7%, falling from US\$770.0 million in 2012 to US\$582.7 million in 2016. However, it will post a forecast-period CAGR of 7.6% to reach US\$792.3 million in 2021, owing to the procurement of multi-role aircraft, frigates and armored vehicles.

Total expenditure registered a CAGR of -7.3%, falling from US\$3.5 billion in 2012 to US\$2.6 billion in 2016, due to the effects of the European debt crisis and efforts to lower the fiscal deficit. Defense expenditure will post a forecast-period CAGR of 6.8% to reach US\$3.4 billion in 2021.

Aircraft segment leads in terms of capital expenditure:

The aircraft category drove capital expenditure and stood at US\$582.3 million in 2016. It will post a forecast-period CAGR of 5.1% to reach US\$742.9 million in 2021 due to the procurement of fighter, refueling, and military transport aircraft. Belgium has also initiated the replacement of its F-16 fighters with 34 modern air frames.

Capital expenditure on C4ISR electronics and IT category to decline:

Capital expenditure on Belgium's C4ISR electronics and IT category stood at US\$161.6 million in 2016, and will post a forecast-period CAGR of -6.7% to reach US\$130.2 million in 2021 due to the allocation of fund to more pressing areas of expenditure.

SCOPE

Industry Snapshot and Industry View - Key Defense and Security Industry Statistics including total expenditure, revenue expenditure, and capital expenditure are analysed to reveal the key issues and trends driving market performance in the Belgium Defense and Security market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Belgium Defense and Security market.

Industry Benchmarking - Benchmark how the Belgium Defense and Security market is performing compared to regional and global markets in terms of total expenditure, revenue expenditure, and capital expenditure to gauge potential for

growth or market entry.

Competitive Landscape - Analyze and compare the performance of the leading players in the Belgium Defense and Security market by business segment on metrics such as arms sales, along with detailed overview and product offerings of the leading Defense and Security players in Belgium.

REASONS TO BUY

How is the market performing in terms of: total expenditure, revenue expenditure, and capital expenditure?

How risky is it to invest in the Belgium Defense and Security industry compared to other European countries?

What is driving the performance of key industry segments such as aircraft and others?

Who are the leading players in the Belgium Defense and Security industry and how does their performance compare?

What trends are being witnessed within the Belgium Defense and Security industry?

What are the Belgium Defense and Security industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

How have the financial deals landscape changed in 2015 and 2016?

What are the recent developments and innovations in the Belgium Defense and Security industry?

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