

Belgium - Transport and Logistics: Investments to drive growth (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

Belgium is recognized as a natural gateway to Europe. The country is divided into three regions - the Flemish Region or Flanders, the Walloon Region or Wallonia, and the Brussels-Capital Region. A central location in Europe and established ports, airports, roads, railways and inland waterways make Belgium ideal for logistic activities. The country is bordered to the north by the Netherlands, to the east by Germany and Luxembourg, and to the south and the west by France, and serves as a hub for European road transport. Belgium has well-developed water transport facilities, including the port of Antwerp, Europe's second-largest port facility, the center of the international diamond trade; the deep sea container port of Zeebrugge; the port of Ghent; and the inland ports of Liege and Brussels. Liege connects Belgium with the main rivers and canals of neighboring countries. Ports are fully integrated with the road and rail networks, providing effective multi-modal transport. Ghent and Zeebrugge are other major seaports through which the movement of goods takes place.

MarketLine's Premium industry reports provide a comprehensive overview of the market and include sections on: risk and reward, key industry trends and drivers, SWOT analysis, competitive landscape, innovation, deals, key developments, and industry benchmarking to compare key performance indicators with regional and global markets.

Key highlights

Infrastructure development and trade recovery to boost GVA

In Belgium, transport and logistics GVA registered a CAGR of -2.0%, falling from US\$25.5bn in 2012 to US\$23.1bn in 2017, due in part to a fall in warehousing and storage services. However, GVA is anticipated to post a CAGR of 1.2%, from US\$23.3bn in 2018 to US\$24.5bn in 2022, driven by new investments in the country's infrastructure and the recovery of international trade.

Road vehicles and parts also accounted for the highest share of imports

Total transport and logistics imports registered a CAGR of -6.7%, from US\$3,255.0m in 2012 to US\$2,466.3m in 2016. The decline can be attributed to a decrease in railway, tramway locomotives, trucks, equipment and parts; and ships, boats and floating structures imports at respective CAGRs of -35.8% and -23.1%. Road vehicles and parts, with an import value of US\$1,073.0m, constituted the highest share of imports in 2016, followed by aircraft, spacecraft and parts with US\$1,018.0m.

Road contributes the highest share of the country's freight traffic

Total freight carriage registered a CAGR of -0.3%, falling from 49.3 billion ton km in 2012 to 48.6 billion ton km in 2017, and is expected to continue post a CAGR of -0.4%, from 48.4 billion ton km in 2018 to 47.7 billion ton km in 2022. The decline is primarily due to a decrease in road freight, which registered a CAGR of -1.1%, from 32.1 billion ton km in 2012 to 30.4 billion ton km in 2017, and is anticipated to post a CAGR of -1.5% over the forecast period due to a shift in preference towards other modes of transport.

SCOPE

Risk & Reward Index: The Risk & Reward index compares the position of Belgium's transport and logistics industry with other countries in the region in terms of specific risk and reward parameters.

Industry Snapshot and Industry View: Key transport and logistics industry statistics include freight traffic, freight volume, fleet size, passengers, import and export gross value added, FDI and trends driving market performance.

Industry SWOT Analysis: Discover the strengths, weaknesses, opportunities and

threats impacting market performance and investment in Belgium's transport and logistics market.

Industry Benchmarking: Benchmark how Belgium's transport and logistics market is performing compared to regional and global markets in terms of GVA, fleet size and freight traffic by mode.

Competitive Landscape: Overview of industry players compared with their peers across a set of indicators.

REASONS TO BUY

How is the market performing in terms of indicators such as freight traffic, freight volume, fleet size, passengers, import and export, gross value added and FDI?

How risky is it to invest in the Belgian transport and logistics industry compared to other countries in Europe?

What is driving the performance of key industry segments such as land, air, water and rail?

Who are the leading players in the Belgian transport and logistics industry and what is their presence in the respective segments?

What trends are being witnessed within the Belgian transport and logistics industry?

What are the Belgian transport and logistics industry's strengths and weaknesses and what opportunities and threats does it face?

What are the recent developments and innovations in the Belgian transport and logistics industry?

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