

The Netherlands - Transport and Logistics: Investments driving growth (Strategy, Performance and Risk Analysis)

<https://marketpublishers.com/r/N1D7CB122D3EN.html>

Date: May 2018

Pages: 74

Price: US\$ 1,995.00 (Single User License)

ID: N1D7CB122D3EN

Abstracts

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SUMMARY

The Netherlands is a constitutional monarchy and all levels of government encourage the development of industry. Consequently, the country's score on the World Economic Forum's Global Competitiveness Report 2016-2017 is higher than the regional average on the political environment parameter. The country was ranked fourth, ahead of major economies such as the UK (seventh), Sweden (sixth) and France (21st), illustrating its stability and global competitiveness. In terms of macroeconomic risk, it scored below the regional average due to of a low tally on the macroeconomic/cyclical data parameter. However, the country scores high on financing and liquidity indicators; above the regional average, due to the easy availability of financing options such net equity and loan capital.

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

Use of longer trains to drive rail freight traffic

In the Netherlands, rail freight traffic recorded a CAGR of 1.2%, from 6.1 billion ton km in 2012 to 6.5 billion ton km in 2017, and is anticipated to post a CAGR of 1.4%, from 6.6 billion ton km in 2018 to 7.0 billion ton km in 2022. Growth will be driven in part by the use of longer trains on routes between the Netherlands and other European nations thanks to the implementation of the ERTMS.

Freight to drive road transport GVA over the forecast period

Road transport GVA registered a CAGR of -1.1%, from US\$35.4bn in 2012 to US\$33.6bn in 2017. However, because of an increase in road freight due to trade volumes with the BENELUX block being high, and the escalating volume of road passengers - expected to post a CAGR of 2.0%, from 35.3 million passengers in 2018 to 38.2 million in 2022 - road transport GVA is anticipated to post a CAGR of 1.8%, from US\$35.6bn in 2018 to US\$38.2bn in 2022.

Freight volume to drive traffic

Water transport freight recorded a CAGR of 1.0%, from 47.5 billion ton km in 2012 to 50.0 billion ton km in 2017, and is anticipated to post a CAGR of 0.9%, from 50.5 billion ton km in 2018 to 52.3 billion ton km in 2022. The major reason will be an increase in trade. Inland freight volume recorded a CAGR of 1.1%, from 350.0 million tons in 2012 to 370.0 million tons in 2017, and is anticipated to post a CAGR of 0.9%, from 374.2 million tons in 2018 to 388.4 million tons in 2022.

SCOPE

Risk & Reward Index: The Risk & Reward index compares the position of the Dutch 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 the Dutch transport and logistics market.

Industry Benchmarking: Benchmark how the Dutch 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 Dutch transport and logistics industry compared to other countries in Western Europe?

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

Who are the leading players in the Dutch transport and logistics industry and their presence in respective segment?

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

What are the Dutch 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 Dutch transport and logistics industry?

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