



Atradius N.V.: Global trade depends on confidence in monetary policy stability

Descrizione

COMUNICATO STAMPA - CONTENUTO PROMOZIONALE

AMSTERDAM, Feb. 4, 2026 /PRNewswire/ - Recent developments surrounding the leadership of the US Federal Reserve have underscored the importance of institutional stability for global trade and financing conditions. While financial markets have reacted calmly so far, confidence in monetary policy remains a key anchor for cross-border business activity.

For internationally active companies, predictable funding costs, stable currencies and reliable buyer behaviour are essential. These conditions are closely linked to the credibility of monetary policy frameworks, particularly in the United States, whose interest rate decisions continue to shape global capital flows and trade finance conditions. Current market pricing suggests that investors still expect US monetary policy to be guided primarily by economic data rather than external pressures. Inflation expectations remain contained, long-term borrowing costs are stable, and global growth continues at a moderate pace.

Atradius forecasts global GDP growth of 2.8% in 2026 and 2.9% in 2027, with US growth holding at around 2.0% in both years. Against this backdrop, Atradius does not expect the Federal Reserve to make abrupt changes to interest rates. "Current trends suggest policy is likely to remain unchanged in the near term, with a maximum of two further quarter-point reductions anticipated in 2026," says John Lori, Chief Economist at Atradius.

However, periods of institutional transition can introduce additional uncertainty. If confidence in policy credibility were to weaken, the impact could extend beyond financial markets into the real economy. Higher perceived risk may translate into rising borrowing costs, increased currency volatility and changes in buyer payment behaviour, affecting trade flows and access to finance.

"As of now, investors in both equity and bond markets do not anticipate major federal influence on the Federal Reserve," adds Lori. "But if that changes, borrowing costs could rise due to higher inflation and uncertainty premiums."

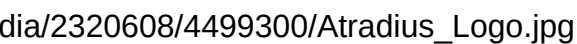
For now, global markets remain orderly. Companies that actively manage credit risk and financing exposure are better positioned to navigate uncertainty and sustain international trade.

For further insights read the full article.

Atradius

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