

Netherlands Business Forecast Report Q2 2014

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Abstracts

Core Views

We expect the economy to post positive growth in 2014, but with the eurozone recovery stumbling in recent quarters, we now expect a more modest outturn for Dutch GDP.

With unemployment rising and the fiscal deficit widening, the government will continue to suffer in the polls.

Major Forecast Changes

We have revised up our 2014 real GDP growth forecast to 0.8%, from 0.5% previously

Key Risks To Outlook

Should the eurozone sovereign debt crisis take a turn for the worse in the coming quarters, we would expect a more pronounced contraction in GDP than currently expected.

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Success Of Eurosceptic Party Will Stymie Further European Integration

The Dutch eurosceptic Party for Freedom (PVV) stands a good chance of topping the polls at the European Parliamentary (EP) election in May. The PVV's populist leanings have gone down well with voters that have become disgruntled with the ruling coalition's austerity policies and the weak economic outlook. Even if the PVV do come out on top in May, we believe that a more eurosceptic presence in the EP will further complicate the process of European integration, rather than reverse it altogether.

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CHAPTER 2: ECONOMIC OUTLOOK

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Economic Activity

Recovery Gaining Traction

The Dutch economy perked up during the tail end of 2013, with a robust 0.7% quarter-on-year increase in real GDP confirming that a recovery is under way. We expect growth to accelerate in 2014, underpinned by a recovery in fixed investment and exports. However, we stress that the Netherlands' double digit (in % of GDP terms) current account surplus, leaves the economy particularly vulnerable if the eurozone recovery fails to gain momentum. In addition, we warn of the risk posed by the correction in the property market, which could stymie a recovery in household spending this year.

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