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Abstracts

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For Q213 we are sticking with our existing forecasts for Morocco's mining sector. We expect growth to speed up in 2013 as a result of new phosphate fertiliser plants in the country, rising to 8.2% year-on-year (yo- y). We expect growth to average 3.6% y-o-y from 2012 to 2017, reaching US$1.61bn by the end of the period. For 2017 we forecast a conservative growth rate, as it remains to be seen how the effect of Saudi Arabia's large investments in phosphate production capacity and China's drive towards self-sufficiency in key raw material inputs will affect Morocco's mining prospects.

The vast majority of capacity additions in coming years will be coming from Saudi Arabia and Morocco. Ma'aden in Saudi Arabia began diammonium phosphate (DAP) production in 2011 and will reach the steady-state production rate of 3mnt (mn tonnes) DAP by 2013. The Office Chérifien des Phosphates (OCP) will also be adding significant new capacity to the market between 2013 and 2015. As producers from Saudi Arabia and Morocco generally sit on the left side of the cost curve, some high-cost capacity (typically Chinese producers) who do not have access to lower-cost rock, may be displaced.

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