

United States Metals Report Q4 2014

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Abstracts

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BMI View: The US metals sector will see modest growth over the next several years. Positive tailwinds from accelerating economic expansion will drive metal production and consumption. Still, total production and consumption levels will remain below pre-crisis levels through 2018.

Our expectation for accelerating real GDP growth in the coming quarters underpins our view that the metal sector will see modest growth over a multi-year period. We forecast real GDP growth of 2.6% in 2015, up from 2.1% in 2014. Moreover, we forecast average annual growth of 2.4% in 2016-2018. Gains in nonresidential construction, automotive production, and oil and gas investment, should lead to steady, albeit low, demand growth for refined metal products. However, elevated inventories, weak foreign demand, and increased competition from cheap imports will limit production growth.

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