

Australia Metals Report Q3 2014

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Abstracts

BMI View: We expect subdued growth in both production and consumption of most metals in Australia as a weakening global commodity market continues to take its toll on the economy. While significant additional global monetary stimulus should help to boost metal prices in the near term, the bout of loosening measures will be insufficient to stem the slowdown and the medium-term outlook for metals remains weak.

The slowdown in the metals industry in Australia is best exemplified by monthly crude steel production, which has continued to slide into negative territory following growth in 2013. Weak demand from slowing domestic construction and a cooling export market will continue to undermine Australia's steel industry in 2014. We do not expect crude to approach pre-crisis levels for many years. The country's two dominant steel producers, BlueScope Steel Ltd and Arrium Ltd (previously known as OneSteel Ltd), have embarked on a series of consolidation plans and restructuring programmes aimed at reducing operating costs and curbing overcapacity amid an environment of weak demand and declining steel prices.

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