

Australia Metals Report Q4 2014

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Abstracts

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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 H214 and 2015. 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.

Contents

BMI Industry View

SWOT

Metals SWOT

Industry Forecast

Steel: Construction Slowdown To Dominate

Table: Steel Production & Consumption (Australia 2010-2018)

Table: Steel Industry Historical Data (Australia 2005-2012)

Aluminium: Slow Growth To 2017

Table: Aluminium Production & Consumption (Australia 2010-2018)

Nickel: Future Lies In Queensland Nickel's Hands

Table: Refined Nickel Production

Regulatory Development

Tax Regime

Table: Australia - Political Summary

Commodities Forecast

Table: BMI Steel Price Forecast

Short-Term Outlook

Core View

Surplus Set To Slim

Production: Reining In Growth

Consumption: Deceleration Ahead

No Respite From Chinese Exports Over Coming Months

Arbitrage Set To Grow Between East And West

Risks To Price Outlook

Table: Steel Data & Forecasts

Table: Global Steel Prices By Region & Product, USD/tonne (average)

Commodity Strategy

Ferrous Metals:

Iron Ore: Price Slump Overdone, Stabilisation In Sight

Steel: Price Forecast Revised Up

Non-Ferrous Metals:

Aluminium: Recent Break Signals Multi-Month Strength

Copper: Subdued Prices Into Q314

Lead: Prices To Strengthen As Deficit Deepens

Nickel: H214 Rally Unlikely

Tin: More Resilient Than Other Metals

Zinc: Sustained Break Unlikely

Table: Select Commodities - Performance & BMI Forecasts
Competitive Landscape
Table: Australia - Largest Listed Metal Producers
Company Profile
Arrium
Table: Arrium Ltd - Financial Data
Rio Tinto
Company Overview
Company Strategy
Latest Financial Results
Table: Rio Tinto - Key Financial Data
Methodology
Cross Checks

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