

# Australia Mining Report Q4 2016

<https://marketpublishers.com/r/A7AD9C1BE70EN.html>

Date: September 2016

Pages: 115

Price: US\$ 1,295.00 (Single User License)

ID: A7AD9C1BE70EN

## Abstracts

Includes 3 FREE quarterly updates

BMI View: Gold, copper and bauxite will emerge as the Australian mining industry's production growth bright spots during 2016-2020. Iron ore and coal output growth will slow more markedly due to continued price weakness.

Although Australia will remain one of the world's largest mineral producers, growth will slow across the board due to continued mineral price weakness. The Australian mining sector will be particularly affected by China's economic slowdown, as the country accounts for almost 80.0% of the country's iron ore exports. We expect Australia's mining industry value to fall to USD94bn in 2016, down from USD106bn in 2015. We forecast Australia's mining industry value growth to pick up hereafter, reaching USD112.6bn in 2020. The potential return of La Niña this year poses downside risks to coal and iron ore production forecasts.

### Latest Developments & Structural Trends

We forecast iron ore production in Australia to register average annual growth of 2.0% during 2016-2020 compared to 10.7% during 2011-2015. This is due to mothballing of mines from junior miners as iron ore prices remain weak as we believe that majors will stick to their production growth targets to crowd out high cost producers. Beyond 2016, iron ore production will start to slow from 4.9% in 2016 to -1.3% in 2020 on the back of low prices. We expect Australia to remain the top global producer of iron ore, with production increasing from 754 million tonnes (mnt) in 2016 to 792mnt by 2020. Australia's share of global output will average 25.5% during this period.

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