

Austria Metals Report Q4 2014

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Abstracts

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BMI's latest Austria Metals Report assesses the prospects for growth in the steel industry over the mediumterm following a return to growth in output and a continuation in year-on-year (y-o-y) growth in consumption during the 2013 full-year. Within it, our forecasts for the industry run out to 2018. The report examines the risk and investment strategies of leading players in the industry. It also examines the impact of a decline in the eurozone, particularly the German market, on Austrian exports.

The performance of Austria's steel industry returned to growth once more in 2013, after deteriorating by 0.6% in 2012. Indeed in 2013, crude output increased by 0.5% to 7.46mnt. BMI estimates that consumption levels continued their upward trend for the fourth year running in 2013, rising by 1.2% from 4.78mnt as at December 31 2012 to 4.84mnt a year later. Going forward, BMI is forecasting both output and consumption to increase in 2014 by 0.8% and 1.0%, respectively, y-o-y. Looking further ahead into 2015, while we forecast consumption to continue accelerating, we see production contracting in volume once more to close the year at 7,443mnt compared with 7,518mnt a year earlier.

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