

Botswana Mining Report Q1 2016

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Abstracts

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BMI View: We expect diamond production in Botswana to grow from 2016, supporting a rise in the overall value of the country's mining sector over the next few years. However, the reliance on this product in Botswana's overall framework is a concern as diamond prices underperform globally and the country's production is estimated to have contracted by 1.6% in 2015. At present, plans to invigorate activity in other sub-sectors, including coal mining, are being held back by a lack of transportation and other infrastructure.

Latest Updates And Structural Trends:

We have revised our estimates for Botswana's 2015 diamond production downwards and now estimate output to have contracted by 1.6% in 2015 to 23.42mn carats. Our revision follows news that Diamond output from Botswana's leading diamond miner, Debswana slid 4% in H115, to 12mn carats, with the company cutting their production target for the year by 13.0%, from 23mn carats to 20mn carats. Weak demand from major buyers such as China has left dealers with few options but to slash prices in an effort to clear the supply glut. According to the Rapaport Group's diamond pricing list, average prices for top quality 1 carat stones dropped by about 13% between January 2015 and September. This has trickled down to miners who have had to drop their prices accordingly. China's economic rebalancing and slowdown in luxury spending has contributed to oversupply in the market and prompted mining firms to cut their 2015 production targets. Meanwhile, diamond exports have also fallen steadily over recent quarters as low global prices and lacklustre external demand have lead companies to cut production targets.

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