

Botswana Mining Report Q3 2016

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Abstracts

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BMI View: Botswana's mining industry has considerable potential, with sizeable mineral deposits complemented by a stable political climate and supportive regulatory environment. The mining industry is largely dominated by domestic players, or, in the case of Debswana, local partners of foreign agents. However overseas interest is growing, particularly in the coal mining sector, the scale of which is just starting to be realised. Price weakness will constrain the expansion of the mining sector in the short term, with diamond production set to contract in 2016, but we see significant room for growth beyond 2020.

Latest Updates & Forecasts

In April 2016, Botswana Diamonds and Alrosa began drilling at the companies' PL260 and PL210 licences in the Orapa project. The companies secured exploration rights to the project in 2015 as part of a joint venture (JV).

In the same month junior Canadian miner Tango Mining announced the extension of the deadline to purchase the diamond mining operations of UK-owned Firestone Diamonds. Tango is reportedly looking to secure a USD30mn loan to finance the acquisition with a view to recommencing operations at Firestone's BK11 mine.

In March, CEO of state-run Botswana Oil Company revealed the organisation was exploring opportunities for coal benefaction, which would allow the country to convert its coal resources into liquid energy and by-products.

We expect Botswana's diamond production to contract in the short term as

leading miners such as Debswana scale back capacity on account of current price weakness. Output will fall by 6.1% in 2016 to 21.8mn carats (mnct) before recovering to reach 23.1mnct in 2020.

However, coal output will expand at a rapid pace, with production set to grow by 15.2% a year on average over 2016-2020 to reach 4.4mn tonnes (mnt).

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