

Brazil Metals Report Q1 2015

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Abstracts

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BMI View: Metals production and consumption in Brazil will remain vulnerable heading into 2015 on account of persistently high energy costs and weak economic growth. However, accelerating growth in the years ahead, driven by gains in the automotive, construction, and infrastructure sectors, will underpin expansion in the metals sector.

Stronger Outlook By Latter Half Of Decade

Metals consumption and production will face headwinds into 2015 on account of modest economic growth (see 'Growth To Disappoint Again In 2015,' November 5). We forecast real GDP growth of just 1.0% in 2015 on the back of sluggish private consumption, subdued fixed asset investment, and a weak business environment. Moreover, electricity costs remain elevated, raising costs for the energy-intensive metals industry. Nevertheless, our multi-year outlook towards Brazilian economic growth, as well as key sectors, is more constructive. The automotive, construction, and infrastructure sectors will see expansion in the years ahead, driving metals demand and hence production, by the latter half of the decade. Additionally, we expect refined copper production and consumption to outperform other metals on account of the metal's widespread usage in multiple sectors and continued investment in productive capacity from Paranapanema, the country's largest producer.

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