

Brazil Mining Report Q2 2015

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Abstracts

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BMI View: Brazil's mining industry will see further growth over the next five years, though the industry's total value will not grow at the same heady rates experienced in the previous decade. Still, mine output will expand as both domestic and foreign firms increase production of both industrial and precious metals.

Despite weak mineral prices, mine output growth in Brazil will remain solid, particularly for iron ore, to 2019. In the case of iron ore, we forecast prices will average lower year-on-year in 2015 at USD60/tonne, compared to USD97/tonne in 2014. Further ahead, we expect prices to experience nearly flat growth to 2019. Nevertheless, Brazilian firm Vale will continue to take advantage of its low unit costs and seek to increase its global market share as higher-cost production in other countries comes offline. Vale cited cash costs slightly above USD23/tonne in Q414, with costs dipping to as low as USD11/tonne for certain mine assets. Furthermore, continued US dollar strength, and resultant depreciation in the Brazilian real, will further cap input costs, which are denominated in local currency. Shipping times and costs to China are longer and higher compared with Australian iron ore producers though, which may lead to Australian producers capturing a greater share of the Chinese iron ore import market.

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