

Brazil Mining Report Q3 2016

<https://marketpublishers.com/r/BB7D55B5CFAEN.html>

Date: July 2016

Pages: 68

Price: US\$ 1,295.00 (Single User License)

ID: BB7D55B5CFAEN

Abstracts

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BMI View: Brazil's mining industry value will continue a multi-year decline in 2016. Nonetheless, robust iron ore production growth and a broader stabilisation of metals prices will support the country's mining industry outlook over 2017-2020.

Latest Developments & Structural Trends

Iron ore will be Brazil's mining industry's growth bright spot due to the sector's low production costs, and a strong output growth strategy from Brazilian mining giant Vale. We expect Brazil's share of global iron ore production to increase from 14.4% in 2016 to 17.7% by 2020, with the sector's output reaching 581mnt in 2020 from 454mnt in 2016.

On June 13, the USD5.7bn civil lawsuit against Vale and BHP Billiton over the Samarco dam burst was dropped. The joint-venture firm, Samarco Mineracao is reportedly looking to restructure USD1.6bn in loans and USD2.2bn in bonds, as operations at the mine will not resume during 2016.

Investment, merger and acquisition activity will pick up in Brazil's mining sector as debt-laden firms seek to offload prime assets. Most notably, in April, Anglo American sold the niobium and phosphate business in Brazil to Chinese firm China Molybdenum for USD1.5bn. On May 9, Yamana Gold announced the USD52.0mn purchase of the Riacho dos Machados gold project from Carpathian Gold.

Brazil's nickel production will contract in 2016, as the key producer Votorantim Metais suspended operations at the Niquelandia mine and Sao Miguel Paulista

metal processor starting in February. While the firm accounted for approximately 37% of Brazil's total nickel output in 2015, Votorantim will exhaust stockpiles before seeing negative growth and may restart operations as prices stabilise over the coming quarters.

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