

Bulgaria Mining Report 2016

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Abstracts

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BMI View: Bulgaria's mining sector is relatively underdeveloped for a country of its size and is considerably smaller than those of the other Central and Eastern European nations, including Romania and Poland. Mining activity in the country is currently focused on two core minerals, coal and copper. Both sub-sectors are heavily consolidated with one key company dominating production in both cases. Expansion in mining production will be relatively moderate over the forecast period to 2020 as, with the majority of mined production used for domestic usage, there is relatively little incentive to expand capacity. That said, the sector is better insulated against global headwinds, namely the ongoing contraction in global commodity prices, than those of larger countries.

Latest Updates And Forecasts:

We have revised our outlook for coal mining upwards in reflection of ongoing expansion plans by stateowned mining company Maritsa Iztok EAD; we forecast coal production to grow by 1.4% in 2016 and by 1.5% a year on average through to 2020 to reach just under 39mn tonnes.

Bulgaria's government is also reportedly devising a national mining strategy that seeks to support the sustainable development of the industry through to 2020. Coal mining, in particular, plays a key role in terms of power generation in the country and is likely to remain an important industry going forward.

We remain below consensus with regard to the pricing of Bulgaria's two key minerals, thermal coal and copper, however. We forecast average thermal coal prices to fall to USD59/tonne in 2016, while the price of copper will slip to

USD5,400/tonne. We see the current low-price environment persisting through to 2020, with moderate growth occurring during this period.

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