

# Chile Mining Report Q2 2016

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## Abstracts

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**BMI View:** Chile's mining sector will experience limited growth, as copper and gold prices remain weak over our forecast period to 2020. The country will remain the top global copper producer, although rising production costs and falling ore grades will curb output growth.

### Latest Updates & Structural Trends

Chile, the largest copper producer, will experience relatively flat growth over 2016 to 2020, as weak copper prices and rising operational costs limit investment. We forecast Chile's annual copper production growth to average 1.6% over this period, increasing in volume from 6.0 million tonnes (mnt) in 2016 to 6.4mnt by 2020.

Chile's gold sector will experience limited growth over our forecast period to 2020 due to persistently low gold prices. We expect production to increase at an average y-o-y rate of 1.5% between 2016 and 2020, with output growing from 1.8moz to 1.9moz.

Elevated operating costs, notably water and power costs, will weigh on Chile's extractive sector, deterring investment particularly in light of lower costs in neighbouring Peru. While lower oil prices and a weaker Chilean peso on the back of US dollar strength will cap growth in input costs, providing a boon to miners facing subdued metal prices, the benefit will be outweighed by rising operating costs.

State-owned Codelco will remain Chile's largest copper miner as measured in

output, and indeed the largest copper miner globally, through 2020. Nonetheless, the company recently pushed back its forecast for 2.0mnt of copper output annually to 2025, from its earlier target of 2020. The firm's USD22bn multiyear investment plan will continue to face project delays due to weak copper prices.

## Contents

### BMI Industry View

Table: Chile Mining Industry Value Forecast (2014-2020)

### Latest Updates & Structural Trends

#### SWOT

#### Industry Forecast

#### Copper: Insufficient Water, Power To Weigh On Growth

Table: Copper Production Forecast (Chile 2014-2020)

Table: Chile - Major New Copper Projects & Expansions

#### Structural Trends

#### Gold: Weak Prices To Delay Projects

Table: Gold Production (Chile 2014-2020)

Table: Chile - Key Gold Projects

#### Industry Risk Reward Ratings

#### Chile Risk/Reward Index

#### Rewards

#### Industry Rewards

#### Country Rewards

#### Risks

#### Industry Risks

#### Country Risks

#### Americas - Risk/Reward Divergence To Emerge

#### Key Takeaways

#### Latest Revisions

Table: Americas - Mining Risk/Reward Index

#### Regulatory Development

#### Commodities Forecast

#### Commodities Outlook

Table: BMI Commodities Price Forecasts

#### Competitive Landscape

#### Sectors

Table: Chile - Select Companies Financial Data, 2014

#### Company Profile

#### Antofagasta - Q2 2016

#### Latest Results

Table: Enter table header

#### Codelco - Q2 2016

#### Latest Results

Table: Codelco - Key Financial Data  
Global Company Strategy - Anglo American - Q2 2016  
Company Strategy  
Latest Results  
Table: Anglo American - Financial Data  
Regional Overview  
Methodology  
Industry Forecast Methodology  
Sources  
Risk/Reward Index Methodology  
Table: Weighting Of Indicators

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