

# Chile Mining Report Q4 2016

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## Abstracts

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**BMI View:** Chile's mining sector value will continue to contract through 2017, on the back of weak mineral prices and elevated operating costs. Nonetheless, country will remain the top global copper producer by a wide margin over our forecast period to 2020.

### Latest Updates & Structural Trends

Chile's mining industry value will continue a multi-year decline through 2017 on the back of subdued copper prices. We forecast the country's mining industry value to contract by 9.2% in 2016, to USD21.7bn and edge higher thereafter, reaching USD24.5bn by 2020.

Chile, the largest copper producer, will experience relatively flat growth over 2016 to 2020, as weak copper prices, weather-related operational disruptions and declining copper ore grades curb output. We forecast Chile's annual copper production growth to average 1.1% over this period, increasing in volume from 5.7 million tonnes (mnt) in 2016 to 6.0mnt by 2020.

Chile's gold sector will experience muted production growth over our forecast period to 2020, due to tightening environmental regulations and elevated costs. Improving gold prices, which we now forecast to average USD1,300/oz in 2016 and USD1,400/oz in 2017, will be an upside risk to the country's gold sector outlook.

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