

China Mining Report Q2 2016

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Abstracts

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BMI View: China's mining sector will face ongoing challenges from low mineral prices over the coming years. Government supported consolidation will support production growth, but, depleting reserves, falling ore grades and the relatively short life span of domestic mines will further drive outward Chinese investment.

Latest Updates & Structural Trends

While cooling Chinese economic growth will adversely impact mining operations, we expect the impact to vary across different mineral segments. Lead and copper mining production growth will decline less strongly than iron ore and lead, due to a more resilient price environment for these metals.

China's structural shortfall in domestic production combined with the government's desire for resource security will continue to spur overseas mining deals. Although China's reliance on imports will increase due to the country's depleting reserves, falling ore grades and the relatively short life span of mines, outbound investment will face more caution, as Chinese projects are increasingly faced with rising costs and project delays. As a result, Chinese firms' 2015 mining merger and acquisition activity (M&A) in Latin America slowed to USD2.1bn, a 72.8% y-o-y decrease from 2014. Chinese mining M&A activity in the Middle East and Africa also fell significantly, by 46.0% y-o-y, to USD135mn in 2015. Chinese metal investment in Sub Saharan Africa also dropped in 2015 to USD1.2bn, significantly lower than USD4.0bn in 2014 and USD8.4bn in 2013.

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