

France Metals Report Q1 2015

<https://marketpublishers.com/r/F38D0BB9DD0EN.html>

Date: December 2014

Pages: 50

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

ID: F38D0BB9DD0EN

Abstracts

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France's metals sector is set for an extended period of very modest but uninterrupted growth in terms of both output and consumption through to the end of our forecast period in 2018. As long as major producers in the sector hold back on investment, however, we will not see growth accelerating at a rate any faster than the broader European market. Within the metals industry, steel will continue to dominate the country's metals industry, aided by a turnaround in the fortunes of France's domestic autos industry in 2015. ArcelorMittal and Rio Tinto, the two largest producers in the country, are facing an increasingly hostile and competitive operating environment, with steel still cheap on a relative basis and aluminium being exported from China. We therefore do not expect France to return to pre-2008 rates of production or consumption before the end of our forecast period to 2018.

Uncertainty surrounds the future of ArcelorMittal's Florange steel mill, which has turned into an increasingly fraught political dispute. By 2013, a deal by the government to save the plant from closure with a five-year investment programme appeared to have failed due to technical difficulties, but it seemed unlikely the government would carry through with its threat to nationalise the facility.

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