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India Mining Report Q4 2016

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Abstracts

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BMI View: India's mining sector will experience solid growth, primarily boosted by the country's positive reforms and vast mineral reserves. Despite this, the sector will continue to face challenges due to the country's inadequate operating environment, mining royalties and low metals prices, which will prevent India from reaching its full growth potential.

Latest Developments & Structural Trends

India will continue to suffer from a persistent coal deficit over the coming years although the country possesses one of the world's largest coal reserves and has significant production growth potential. We forecast India's coal output to grow from 753mn tonnes (mnt) in 2016 to 1,014mnt in 2020, posting average annual growth of 7.6% during 2016-2020, a sizeable acceleration from an average growth of 4.5% annually during 2011-2015. This is because the Indian government has made great progress in improving coal mine production and coal offtake in recent quarters.

We forecast India's iron ore output to grow from 132.9mnt in 2016 to 164.4mnt in 2020. This represents an average annual growth of 5.0% during 2016-2020, higher than the average contraction of 9.1% y-o-y over 2011-2015, following mining bans in the three largest iron-ore producing states of Goa, Odisha and Karnataka, which have since been lifted. Although the passing of the Mines & Minerals Development and Regulation Act will support India's iron ore output growth, weak iron ore prices will limit the sector growth outlook. We forecast iron ore prices to average USD48.0/tonne over 2016-2020, significantly lower than USD115.0/tonne during 2011-2015. This is due to oversupply from Australian

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miners and weakened Chinese demand for iron ore.

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