

# Indonesia Mining Report Q1 2016

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## Abstracts

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BMI View: Indonesia's mineral production growth will slow on the back of the country's ban on mineral exports and continued mineral price weakness.

### Latest Developments & Structural Trends

With the boom years in commodity prices behind us, we believe more miners in Indonesia will be forced to put the brakes on investment over the coming quarters. In January 2014, the government implemented the ban on unprocessed minerals, in order to stimulate smelter construction and increase mineral export value.

Contrary to numerous smelter project proposals in 2014 and our past expectations on high smelter investment from China, smelter investment for bauxite has been stagnant with just one local smelter owned by Inalum completed in 2014 and all other projects halted to date. This will lead to further production cuts by bauxite miners in the near term. As such, we have revised down our forecasts as we expect the majority of new smelter projects will not materialise due to both low bauxite prices and the mineral ore export ban staying in place over the coming quarters. We have revised down our average annual bauxite production growth forecast for Indonesia down from 55.0% to 40.0%, 58.0% to -4.0% and 20.0% to -4.0% for 2015, 2016 and 2017, respectively.

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