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Abstracts

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BMI View: Indonesia's mineral production growth will remain slow on the back of heightened environmental protection, slowdown in the Chinese economy and continued mineral price weakness. The impending ban moderation on the export of mineral ores will provide some respite to production, especially in the case of bauxite.

Latest Developments & Structural Trends

We expect the Indonesian government will push ahead with its February 2016 proposal to revise the country's mineral ore export ban by September 2016 as expected investment in the downstream sector has not materialised. The bauxite sector will benefit most from the relaxation of the ban, as the sector registered poor smelter construction and the greatest loss in revenues as a result of the ban. We expect our current production forecasts to face upside risks due to the impending ban moderation.

We forecast bauxite production growth in Indonesia to register an annual average of 148.2% during 2016-2020, mainly because of acceleration in production in 2016 of 600% due to China Hongqiao Group Limited's smelter facility coming online. Hongqiao will initially produce one million tonnes per annum of aluminium, doubling capacity by 2017. One tonne of aluminium requires approximately five tonnes of bauxite to produce. 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 as a result of low prices and lack of funding. In March 2016 Hongqiao started trial runs in its new alumina smelter in Indonesia, adding to the only other smelter in the country, PT Indonesia Chemical Alumina, a subsidiary of diversified local

miner PT Antam.

We expect Indonesia's coal production to fall by 15.0% to 314 million tonnes (mnt) in 2016, followed by subdued growth henceforth to 2020, registering an average annual growth of 3.0% per annum during 2016-2020. Over the long term, despite the one time fall in domestic production due to the crackdown on illegal mining in 2015, we believe output will be supported by strong demand from a domestic pipeline of coal-fired power plants and continued import demand from Asia. Emerging economies including China and India will continue to rely on coal for power generation over the next decade. We expect domestic shortfalls in these countries to increase dependency on coal imports.

Contents

BMI Industry View

Table: Indonesia - Mining Industry Value Forecast (2012-2020)

Latest Developments & Structural Trends

SWOT

Industry Forecast

Bauxite: Slow Recovery Without Ban Moderation

Latest Developments

Table: Bauxite Production Forecast (Indonesia 2012-2020)

Table: Indonesia - Major Bauxite Project

Structural Trends

Coal: Subdued Growth Ahead

Latest developments

Table: Coal Production Forecast (Indonesia 2012-2020)

Table: Indonesia - Select Coal Projects

Structural Trends

Copper: Steady Growth Ahead

Latest Developments

Table: Copper Production Forecast (Indonesia 2012-2020)

Table: Indonesia - Major Copper Projects

Structural Developments

Grasberg To Drive Output Growth

Nickel: Production To Rebound

Latest Developments

Table: Nickel Production Forecast (Indonesia 2010-2020)

Table: Indonesia - Select Nickel Projects

Structural Trends

Tin: Government Regulations To Slow Growth

Latest Developments

Table: Tin Production Forecast (Indonesia 2012-2020)

Table: Indonesia - Major Tin Projects

Structural Trends

Industry Risk Reward Ratings

Risk/Reward Index

Rewards

Industry Rewards

Country Rewards

Risks

Industry Risks

Country Risks

Asia Risk/Reward Index

Australia Stays On Top While India & Myanmar Gain

Shifting Scores Reflect Changing Sector Dynamics

Table: Asia - Mining Risk/Reward Index

Regulatory Development

Key Developments

Ban Moderation On The Horizon

Table: Indonesia - Export Restrictions On Select Commodities

The 2009 Mining Law

Trade & Investment Risk Analysis

Commodities Forecast

Commodities Outlook

Table: BMI Commodities Price Forecasts

Competitive Landscape

Key Players

Table: Financial Data For Key Mining Firms Listed In Indonesia

Company Profile

PT Antam

Table: PT Antam - Key Financial Data

PT Bumi Resources

Table: Bumi Resources - Key Financial Data

PT Indo Tambangraya Megah Tbk (ITMG)

Table: ITM - Key Financial Data

PT Timah

Table: PT Timah - Key Financial Data

Freeport-McMoRan

Table: Freeport McMoRan - Key Financial Data

Regional Overview

Continued Domination Of Iron Ore Production

Indian Coal Consumption To Outperform

China & India To Lead In Outbound Investment

Indonesian Ban To Continue

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Weighting Of Indicators

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