

Kazakhstan Mining Report Q1 2016

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Abstracts

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BMI View: We maintain a bullish outlook as to the long-term expansion of Kazakhstan's mining sector, with the country becoming an increasingly attractive destination for investment. However, we note that immediate challenges will threaten to weigh on production growth over the next few years. We have revised our zinc output forecasts for the country downwards and retain cautious outlook with regards to coal and iron ore.

Latest Updates And Structural Trends

We still expect to see positive growth in Kazakhstani coal and iron ore production over the next few years, despite a deteriorating price outlook for both these markets. We forecast coal output to grow by 1.2% y-o-y over 2015-2019, while iron ore production will expand by 1.9% a year over the period.

However, we have made significant downwards revisions to our zinc production estimates since the last quarter, following Glencore's decision to cut zinc production across its global operations and especially those located in Kazakhstan. The company is the majority share holder of Kazzinc, which accounts for over 90.0% of the country's total zinc production in 2014. As such, we revised down Kazakhstan's zinc production growth from 2.4% to -15.0% and 1.4% to -18.0% for 2015 and 2016, respectively. We expect 2015 output to total 281kt and 2016 output to be only 230kt. The country's zinc mining industry value will fall slightly, from 4.8% to 4.0%.

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