

# Malaysia Mining Report 2016

<https://marketpublishers.com/r/MAF0407E68DEN.html>

Date: June 2016

Pages: 48

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

ID: MAF0407E68DEN

## Abstracts

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**BMI View:** Malaysia's mining output growth will remain weaker than seen in previous years due to continued mineral price weakness. Despite this, the continued presence of major miners across the gold and tin sub-sectors will ensure that output from both segments continues to grow over the forecast period, albeit at a slower rate to that seen in recent years.

### Latest Developments & Structural Trends

We forecast gold prices to edge higher over the coming months, averaging USD1,275/oz in 2016 and reaching USD1,500/oz by 2020 (see: 'Gold: Upward Revision On Inflation Pressure, May 6).

We forecast Malaysia's overall gold production to average annual growth of 6.0% during 2016-2020 to total 184 thousand ounces (koz). While still high by most global comparisons, this represents a marked dip on recent growth levels, which are estimated to have averaged 8.4% a year during 2010-2015.

We have increased our 2016 tin price forecast to USD16,500/tonne owing to a stabilisation in the Chinese economy over Q116 that has boosted all industrial metal prices significantly over January-April. While we expect consolidation over the remainder of 2016, tin prices will continue to recover beyond 2016 as the global market posts sustained market deficits and inventories dwindle.

The country's largest producer Malaysia Smelting Corporation's renewed focus on local operations means we expect Malaysia's overall tin output to remain largely unaffected by the current slump in global prices, especially as we

forecast global prices to start to rebound from 2017. Malaysia's refined tin output will face an average annual growth of 1.4% during 2016-2020, which is a significant increase from the -2.2% growth from 2011-2015. Nevertheless, Malaysia's global market share will fall modestly from 10.2% in 2016 to 9.9% in 2020.

We expect Malaysia's bauxite mining sector to stagnate over our forecast period to 2020, as it is facing growing environmental, land and labour issues and an impending relaxation of Indonesia's bauxite ore export ban in 2016. Bauxite production will register an average annual growth rate of 4% over 2016-2020, which is a significant fall from the 264% recorded over 2011-2015.

## Contents

BMI Industry View

Table: Malaysia - Mining Industry Value

SWOT

Industry Forecast

Gold: Major Producers To Weather The Storm

Latest Developments

Table: Gold Production Forecast (Malaysia 2014-2020)

Structural Trends

Table: Malaysia - Select Gold Mining Projects

Tin: Price Slump Adds To Weak Growth Outlook

Latest Developments

Table: Malaysia: Tin Production Forecast

Table: Global - Top 10 Refined Tin Producers By 2015 Output

Malaysia - Stagnant Growth Ahead For Malaysia's Bauxite Sector

Industry Risk Reward Ratings

Asia Risk/Reward Index

Key Takeaways

Latest Revisions

Table: Asia - Mining Risk/Reward Index

Regulatory Development

Key Details

State Mineral Enactment A Boon For Miners

Table: Breakdown Of Mining Licence

Table: Breakdown Of Prospecting & Exploration Licence

Trade & Investment Risk Analysis

Commodities Forecast

Commodities Outlook

Table: BMI Commodities Price Forecasts

Competitive Landscape

Company Profile

Monument Mining

Table: Monument Mining - Key Financial Data

Malaysia Smelting Corporation Berhad

Table: MSC - Key Financial Data

Regional Overview

Asia Overview

Slowing Iron Ore Production

Indian Coal Consumption To Outperform  
China & India To Lead In Outbound Investment  
Indonesian Ban Moderation Ahead  
Chinese Coal & Steel Sectors To Consolidate Slowly  
Methodology  
Industry Forecast Methodology  
Sources  
Risk/Reward Index Methodology  
Table: Weighting Of Indicators

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