

Mexico Metals Report Q3 2014

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Abstracts

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BMI Forecast: We expect expansion of the automotive, manufacturing, construction, and oil and gas sectors, all of which rely on steel and other refined metals as inputs, will lead to steady production and consumption growth for Mexico's metal sector in 2014-2018. Domestic steel producers are likely to face pressure from both cheaper foreign imports and US duties on Mexican steel, though we do not believe either will significantly impact the sector.

We anticipate strengthening macroeconomic growth in Mexico over the next five years, driven by growth in automotive production, general manufacturing, and infrastructure, will drive production and consumption growth of Mexican metals, particularly steel. We forecast real GDP growth of 3.3% in 2014, far stronger than growth of 1.1% in 2013. For 2015-2018 we forecast average annual growth of 3.8%.

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