

# Mexico Metals Report Q4 2014

<https://marketpublishers.com/r/MD461CEF2D3EN.html>

Date: October 2014

Pages: 34

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

ID: MD461CEF2D3EN

## Abstracts

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**BMI View:** Expansion of the automotive, manufacturing, construction, and oil and gas sectors, all of which rely on steel and other refined metals as inputs, will enable steady production and consumption growth for Mexico's metal sector to 2018. Domestic steel producers will contend with cheaper foreign imports and US duties on Mexican exports, though investment into and output from the sector is unlikely to face significant risks.

Strengthening economic growth in Mexico over the next five years will underpin production and consumption growth of Mexican metals, particularly steel. While weaker-than-expected economic activity in H114 prompted us to downgrade our 2014 real GDP growth forecast from 3.1% to 2.6%, we expect the economy to accelerate markedly in H214 and 2015, driven by a recovery in the construction sector, stronger manufacturing exports, and an improvement in real private consumption. For 2015, we forecast real GDP growth of 3.7%, and for average annual growth of 3.8% in 2016-2018. These factors should ensure Mexico remains the second-largest producer and consumer of steel in Latin America, behind Brazil.

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