

# Mozambique Mining Report Q1 2016

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## Abstracts

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**BMI View:** Mozambique's mining revenue will remain heavily dependent on the country's coal sector, leaving the sector exposed to continued global coal price weakness. Despite this, coal production growth will continue to exceed gold output growth. Furthermore, both sectors will continue to attract interest from overseas investors.

### Latest Developments & Structural Trends

Mozambique's mining sector will remain under pressure on a number of fronts, most significantly coal price weakness. Low coal prices will undermine the development of the country's coking coal industry. We expect a number of Western mining firms to divest their exposure in Mozambique due to the country's inadequate infrastructure and high start-up costs. For instance, Rio Tinto exited its position from the market to be replaced by India's International Coal Ventures in Q414. In Q115, Vale sold a significant share of its stake in the Moatize coal mine to Japan-based Matsuoi & Co. However, the increasing apprehension of Western investors towards the market is being compensated for to a large extent by increased interest from Indian firms as they look to secure long-term sources of coal to meet growing domestic demand. A number of Indian firms have already entered the market as they look to take advantage of the country's strategic location across the Indian Ocean.

The country's long-term potential as a coal exporter will have to be considered against increasing political risk and government intervention in the mining sector. In Q114, Mozambique's government announced its intention to increase taxation on the mining sector and to ensure greater mineral wealth is allocated

locally. Although we expect the country to remain amenable to foreign investment and to maintain a broadly attractive business environment, this policy move in the mining sector will be a cause for concern amongst investors.

## Contents

### BMI Industry View

Table: Mozambique Mining Industry Value

### Latest Developments & Structural Trends

#### SWOT

#### Industry Forecast

#### Coal: Investment To Boost Growth

#### Latest Developments

Table: Mozambique - Coal Production Forecasts

Table: Mozambique - New Coal Projects

#### Structural Trends

#### India & Japan To Ramp Up Investment

#### Price Drop Hits Profitability Though Not Output

#### Infrastructure Remains Key Challenge

#### Gold: Growth To Lack Behind Coal Sector

#### Latest Developments

Table: Mozambique - Gold Production

Table: Mozambique - Gold Projects

#### Structural Trends

#### Exploration Points To Potential Long-Term Expansion

#### Industry Risk Reward Ratings

#### Mozambique - Mining Risk/Reward Index

#### Rewards

#### Industry Rewards

#### Country Rewards

#### Risks

#### Industry Risks

#### Country Risks

#### Africa: Major Risks Remain

#### Key Takeaways

#### Latest Revisions

Table: Africa - Mining Risk/Reward Index

#### Regulatory Development

#### Recent Developments

#### Trade & Investment Risk Analysis

#### Commodities Forecast

#### Commodities Outlook

Table: BMI Commodities Price Forecasts

## Competitive Landscape

Table: Select Companies - Comparative Metrics

## Company Profile

Rio Tinto - Q1 2016

Company Overview

Company Strategy

Table: Rio Tinto - Key Projects

## Latest Financial Results

Table: Rio Tinto - Key Financial Data

Vale - Q1 2016

Company Overview

Company Strategy

Latest Results

Table: Vale - Key Financial Data

Company Details

Regional Overview

Africa Mining: The Four Key Themes

Key Themes

Chinese Investment To Continue

Iron Ore Price Weakness To Curb Growth

Regulatory Uncertainty To Curb Growth

Mining To Remain Key Contributor To GDP

Methodology

Industry Forecast Methodology

Sources

Risk/Reward Index Methodology

Table: Weighting Of Indicators

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