

# Netherlands Metals Report Q1 2015

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## Abstracts

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**BMI View:** After back-to-back years of volatility in the Dutch metals sector, 2014 looks to have laid the foundation for a prolonged period of stability in terms of both production and consumption. This positive momentum in the sector is set to continue through to the end of our forecast period in 2018. BMI expects steel to continue to dominate the country's metals industry; however, we see no significant new investment in the sub-sector over the coming years. Tata Steel, the largest producer in the country, is facing up to an increasingly hostile and competitive operating environment, with cheap steel and aluminium being exported from China. Nevertheless, opportunities remain in high-quality steel, of which the Netherlands is a key producer.

### Long-Term Growth In Output

After posting a contraction in both production and consumption in 2012 and 2013, 2014 heralded a turnaround for the steel industry. We expect the year to close with output up 1.4% and consumption up 2.1% y-o-y. However, BMI cautions that monthly data for steel production in the Netherlands suggests that a strong close to the year will be necessary for such estimates to become a reality. Over the first eight months of the year (correct to data published for August) output rose for five months and contracted for three. Although this leaves the market sat below where it started in 2014, we still maintain our year-end estimates.

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