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Abstracts

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BMI View: The Netherlands' metals sector has put recent volatility behind it, and is looking forward to enjoying a sustained period of growth in both steel production and consumption through to the end of our forecast period to 2018. The growth momentum will benefit from prices for high quality steel remaining elevated. Indeed in both output and use in the Netherlands growth will be uninterrupted over the coming years. Within this, we believe steel will continue to dominate the country's metals industry; however, we do not expect any significant new investment 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. However, opportunities remain in high-quality steel, of which the Netherlands is a key producer.

Long-Term Growth In Output

After posting a contraction in production of 0.8% y-o-y in 2012, the Netherlands benefitted from decreased volatility in the eurozone to post steel output of 6,948,000 tonnes in 2013, representing an improvement of 1.0% y-o-y. Similarly after a contraction in 2012, steel consumption in the Netherlands recorded a return to growth last year. The sector turned around a contraction of 6.8% in the previous year to record growth of 2.95% last year.

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