

Philippines Mining Report 2015

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Abstracts

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BMI View: The mid-2014 exit of Glencore Xstrata from the USD5.9bn Tampakan copper-gold project reflects continuing challenges for mining investment in the Philippines, largely due to subdued metal prices. Moreover, resource nationalism will remain a threat as the Philippine government continues to consider raising taxes on the mining sector.

Falling metal prices and fading attraction of frontier mining will continue to dampen investment into the Philippines' mining space over the coming years. As spotlighted by the exit of Glencore Xstrata from the USD5.9bn Tampakan project in South Cotabato, which announced its decision to sell its stake in the mine in a bid to prune its portfolio and focus on the development of brownfield projects, we expect the majority of international miners to focus on brownfield investment rather than costlier and riskier greenfield projects.

Indeed, we believe frontier regions will suffer the brunt of cutbacks in investment given the inherent risks and huge capital commitment associated with immature regulatory frameworks and a paucity of sound infrastructure. However, domestic players will continue to expand their footprint and develop deposits deemed economical. Average annual sector growth will come in at 5.3% in 2015-2019, though this will be from a low base. Moreover, the mining sector will continue to make up a minor part of the wide Philippine economy.

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