

# Poland Mining Report Q3 2016

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## Abstracts

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**BMI View:** Growth in the Polish mining sector will be modest over the coming years. The coal sector will be overhauled as the government seeks to either restructure or close unprofitable mines. Copper output will struggle as falling copper ore grades and weak prices are set to hinder growth. Nevertheless, the rate of growth we forecast indicates that the country will remain one of the most significant players in the European coal, silver and copper markets.

### Downside Risks

The main downside risks to our forecasts are weak copper and coal prices, cheap coal imports and labour unrest in the sector. Due to our view for a sharp slowdown in Chinese economic growth and expectation for increased copper supply, we expect lower copper prices over coming years. We forecast copper prices to average USD6,450/tonne over 2014-2018, significantly lower than their 2011 average of USD8,826/tonne.

Combined with falling ore grades in Poland, these lower prices will significantly disincentivise investment in the sector. Lower commodity prices will also have the effect of squeezing miners' margins, precipitating cutbacks and thus heightening the risk of industrial unrest. Poland's mining sector is comprised of strong unions and as such we highlight tense wage negotiations and potential strikes to affect the sector over coming years.

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