

Poland Mining Report Q4 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 restructure 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.

Latest Developments And Structural Trends

We expect only modest growth in Poland's copper sector over the coming years as weak copper prices and declining ore grades coalesce to deter investment in the sector. We expect copper production in the country to reach 470kt by 2020, an average annual growth rate of 1.8% y-o-y from 2015.

In March 2016 it was announced that Poland's Finance Ministry could lower to 1bn zlotys (USD262.2mn) the mining tax paid almost solely by state-controlled copper producer KGHM. The levy introduced in 2012 weighs heavily on KGHM, Europe's second biggest copper producer, given falling metal prices

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