

# Russia Mining Report Q4 2016

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## Abstracts

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BMI View: Russia's gold and coal production growth will be the sector's relative bright spots, while PGM's and iron ore output growth will grind to a halt. Low metal prices, the country's inadequate infrastructure and Western sanctions will continue to limit the sector's production growth.

### Latest Developments & Structural Trends

The gradual re-orientation of Russia's coal exports from Europe to Asia will be driven by growing demand for both thermal and coking coal in the latter region (see 'Russia Eyes The East', February 10 2015).

Russia's gold production growth will slow as the country's unfavourable regulatory environment towards foreign investment will deter new miners from entering the sector and limit new projects from coming online. While we expect gold prices to edge higher, prices will not recover to 2011-2014 heights over our forecast period to 2020.

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