

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.

Contents

BMI Industry View

Table: Russia Mining Industry Value

Table: Russia Mining Industry Value

SWOT

Industry Forecast

Coal: Eastward Shift To Support Growth

Table: Coal Production Forecast (Russia 2014-2020)

Table: Russia - Distance From Coal Production Area To Shipping Seaport

Gold: Output To Edge Modestly Higher

Table: Russia - Gold Mine Production Forecast

Iron Ore: Metalloinvest To Be Key Growth Driver

Table: Iron Ore Production (Russia, 2014-2020)

Nickel: Tough Times Ahead For Miners

Table: Russia - Nickel Mine Production Forecast

Palladium: Muted Growth Ahead

Table: Palladium Production

Platinum: Vast Reserves Offer Significant Potential

Table: Russia - Platinum Production

Table: Russia - Largest Platinum Projects

Industry Risk/Reward Index

Russia Risk/Reward Index

Europe: Risk/Reward Index

Table: Europe - Mining Risk/Reward Index

Regulatory Development

Commodities Forecast

Commodities Outlook

Table: BMI Commodities Price Forecasts

Competitive Landscape

Table: Russia - Key Financial Data

Company Profile

Polyus Gold

Table: Polyus Gold - Financial Data

SUEK

Table: SUEK Subsidiaries

Norilsk Nickel

Table: Select Commodities - Price Forecasts

Table: Norilsk Nickel - Key Projects

Table: Norilsk Nickel - Key Financial Data
Regional Overview
Methodology
Industry Forecast Methodology
Sources
Risk/Reward Index Methodology
Table: Weighting Of Indicators

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