

South Africa Metals Report Q2 2014

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Abstracts

BMI View: The outlook for South Africa's metals industry is increasingly troubled as persistently low output prices, rising energy costs and further intense wage negotiations with unions are set to plague the sector. Metals consumption growth will perform better than production growth, due to solid demand growth from the autos sector. We expect this demand growth to be met in large part by increased imports, as investment in South African production facilities will be held back by the glut of metals, particularly steel, on the world market.

In terms of the domestic market, metals consumption will track broader economic growth in South Africa, which we anticipate to be slow but steady with a modest recovery expected over coming years. We see autos production growth as a key driver of metals consumption. We forecast autos production to grow by an annual average of 2.9% over 2014-2018, while construction industry value will grow by 3.9% y-o-y over the same period.

Contents

BMI Industry View

SWOT

Metals SWOT

Industry Forecast

Steel: Little Incentive To Invest

Table: South Africa - Major Steel Plants

Table: South Africa - Steel Consumption & Production ('000 tonnes)

Table: South Africa - Steel Production & Trade Historical Data ('000 tonnes, unless stated otherwise)

Aluminium: Diminishing As An Export Hub

Table: South Africa - Primary Aluminium Production, Consumption & Balance ('000 tonnes, unless stated otherwise)

Nickel: Declining Platinum Output To Constrain Nickel

Table: South Africa - Refined Nickel Production, Consumption & Balance ('000 tonnes, unless stated otherwise)

Regulatory Development

Tax Regime

Table: South Africa - Political Overview

Commodities Forecast

Commodity Strategy

Steel: Locked In Secular Downtrend

Aluminium: US\$1,800/tonne To Provide Strong Support

Copper: Bearish View In Place Despite Some Recovery

Nickel: Despite Recent Gains, Downside Risks Dominate

Zinc: Channelling Support

Table: Select Commodities - Performance & BMI forecasts

Table: BMI Commodities Strategy

Commodities Forecast

Table: BMI Steel Forecast

Table: Steel Data And Forecasts, 2009-2017

Competitive Landscape

Table: South Africa - Major Steel Production Facilities

Table: South Africa - Select Listed Metals Producers

Company Profile

ArcelorMittal

Company Strategy

Latest Financial Results

Company Details

Financial Data

Table: ArcelorMittal - Key Financial Data

Methodology

Cross Checks

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