

South Africa Metals Report Q4 2014

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Abstracts

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BMI View: South Africa's metals industry will continue to see subdued production activity due to prices remaining below multi-year highs, elevated energy costs, and labour unrest. Metals consumption growth will rise faster than production growth, due to solid demand growth from the auto, construction, and infrastructure sectors.

Our metals consumption outlook remains constructive on the back of our expectations for broader economic growth in South Africa in the coming years. We see autos production growth, which we currently forecast at 2.9% on average per annum in 2014-2018, as a key driver of metals consumption. Our forecast for the construction and infrastructure industries to see average annual growth of 3.9% and 3.7%, respectively, over the same period should also support the domestic metals industry. Due to production weakness across the metals landscape, we expect increased imports in the coming quarters, as investment in South African production facilities will be held back by the glut of metals, particularly steel, on the world market.

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