

South Africa Mining Report Q1 2016

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Abstracts

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BMI View: South Africa's mining sector will face persistent headwinds due to labour unrest, mineral price weakness, further divestments and retrenchment.

Latest Updates And Structural Trends

On December 8 2015, Anglo American announced a restructuring plan that will focus on divestment of non-core and loss-making assets, downsizing its workforce and consolidating business divisions in an effort to weather ongoing commodity price weakness. South Africa's coal industry will be significantly hit by Anglo's restructuring plans as the firm accounts for nearly 21.5% of the country's total thermal coal production. Furthermore, Anglo's plans to cut employment will hit the sector as well, as Anglo employs over 24,500 in their thermal coal operations, while the firm's total employment within South Africa totals 72,000.

As Anglo American is keen to offload the majority of its South-African assets, this could result in a significant decline in the country's coal production growth. As such, we revised down our 2016 and 2017 coal production forecast from 1.3% to -4.0% and 1.0% to -1.5%, respectively. Despite this, South Africa, which is Sub-Saharan Africa (SSA)'s largest coal producer, with a 94.6% share of regional coal production in 2015, will remain the region's largest coal producer. We forecast South Africa's coal production to grow from 252million tonnes (mnt) in 2016 to 264mnt in 2019. This would represent average annual growth of 0.1% during 2016-2019, slightly higher than the average 0.9% decline during 2010-2014.

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