

South Africa Mining Report Q2 2015

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Abstracts

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BMI View: South Africa's mining sector growth will remain subdued as the country's gold and platinum sector face diminishing margins and industrial strife. Additionally, the coal and iron ore sectors will come under pressure as weak prices will dent production output over the coming quarters.

Vast untapped mineral reserves, supportive government jurisdictions and few obstacles prohibiting foreign investment make South Africa's business environment one of the best on the continent. Despite this, weak mineral prices and continued labour unrest will curb the country's mining sector growth outlook over the coming quarters. We expect South Africa's share of global mined output to decline as other mining jurisdictions experience faster rates of growth. We expect investment, particularly in gold mining, to be more attracted to low-cost, high resource opportunities in the rest of the continent such as the Democratic Republic of Congo. We forecast South Africa's mining industry value to grow from USD32.8bn (billion) in 2015 to USD37.0bn in 2019. This represents an average growth of 2.5% year-on-year (y-o-y) over 2015-2019, significantly lower than the average growth of 9.3% y-o-y observed over 2005-2014.

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