

Turkey Metals Report Q2 2014

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Abstracts

BMI View: Despite relatively weak growth to be expected in the near-term, the medium-term outlook for Turkey's metals sector remains promising due to strong demand from the domestic construction and autos sectors. Near-term headwinds are likely to include currency weakness making imports of materials more expensive and weak global steel prices squeezing steel-makers' margins. An uptick in political risk in Turkey also presents a key downside risk.

Over the medium-term we forecast Turkey's total steel production to grow from 35.9mnt in 2012 to 45.6mnt in 2018. We expect growth to average 5.6% y-o-y over 2014-2018, as we predict a recovery from the negative growth seen during 2013, which was a result of weak global steel prices and a weak lira pushing up the cost of imports of materials.

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