

Turkey Metals Report Q4 2014

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Abstracts

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BMI View: Despite relatively weak growth to be expected over coming months, 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 34.7mnt in 2013 to 44.6mnt in 2018. We expect growth to average 5.2% 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.

Contents

BMI Industry View

SWOT

Metals SWOT

Industry Forecast

Steel: Near-Term Headwinds, Long-Term Growth

Consumption

Production

Table: Steel Production & Consumption (Turkey 2010-2018)

Table: Steel Industry Historical Data (Turkey 2005-2012)

Regulatory Development

Political Risk Heightened

Anti-Corruption Drive Paying Off

Tax Regime

Table: Political Overview

Commodities Forecast

Table: BMI Steel Price Forecast

Short-Term Outlook

Core View

Surplus Set To Slim

Production: Reining In Growth

Consumption: Deceleration Ahead

No Respite From Chinese Exports Over Coming Months

Arbitrage Set To Grow Between East And West

Risks To Price Outlook

Table: Steel Data & Forecasts

Table: Global Steel Prices By Region & Product, USD/tonne (average)

Commodity Strategy

Ferrous Metals:

Iron Ore: Bounce Won't Last, Weakness In 2015

Steel: Long Road To Price Recovery

Non-Ferrous Metals:

Aluminium: Elevated Prices In Coming Weeks

Copper: Strength To Turn To Weakness By Q414

Lead: Price Bounce Underway

Nickel: Prices To Cool In Coming Months

Tin: Market Tightness To Drive Prices Higher

Zinc: Prices To Moderate By Q414

- Table: Select Commodities - Performance & BMI Forecasts
- Competitive Landscape
 - Table: Turkey - Steel Mills
 - Table: Turkey - Largest Listed Metal Producers, Key Financial Metrics
- Company Profile
 - Erdemir
 - Company Strategy
 - Table: Erdemir - Financial Data
 - Kardemir
 - Company Strategy
 - Table: Kardemir - Financial Data
- Methodology
- Cross Checks

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