

Ukraine Metals Report Q1 2015

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Abstracts

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After back-to-back years of contraction in both production and consumption in the metals sector in the Ukraine between 2012 and 2013, the sector turned a corner last year. Despite being rocked by the ongoing conflict with Russia and the subsequent political and economic uncertainty BMI estimates that the sector bounced back to post a 3.5% y-o-y gain in output and a 3.1% y-o-y increase in use. Going forward, Ukraine's metals sector will see modest growth over our forecast period to the end of 2018, with a handful of new projects to increase production growth. Production will not return to pre-crisis highs, however, due to global overcapacity and steel prices not making substantive gains over 2013 - they have, however, since improved. There are no major expansions on the cards, and no major players in either the aluminium or steel industries have announced substantial investment plans.

Figures recorded during the first eight months of 2014 have certainly been supportive of this view. Metals trader Ukrainian Mining and Metallurgical Company has published data that shows that Ukrainian exports of steel products grew by 2.3% y-o-y to 17.9mn tonnes in January-August 2014 (latest available data). Ukraine's exports of pig iron totalled 1.6mn tonnes in the reported period, up by 22% y-o-y during the same time period. The country's imports of steel products increased by 39.5% y-o-y to 883,000 tonnes in January- August 2014, while its import revenues generated by steel products fell by 44.8% y-o-y to USD877mn.

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