

Zambia Mining Report Q1 2016

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Abstracts

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BMI View: Zambia's mining royalty reversal will support the sector's investment outlook. However, both low copper and coal prices and the country's high degree of mineral policy uncertainty will continue to limit the sector's production growth until the country's Presidential elections in 2016.

Latest Developments & Structural Trends

Mineral policy uncertainty will continue to hurt the sector's growth. Although the April 20, 2015 downwards royalty tax revision is positive news for miners, mineral policy uncertainty will limit a share of investors from entering the sector. The new royalty tax will come into effect on July 1 2015 and will cut royalties on open pit mining from 20.0% to 9.0%. The downwards revision supports our view that the royalty tax would be unsustainable in its current form (see 'Tax Moderation On The Cards' January 9).

The current Zambian President, Edward Lungu, was narrowly elected on a populist platform in January 2015, hence his reaffirmation of the previous mining royalty tax. However, with the April 2015 slashing of the mining tax, Lungu has backpedalled on his populist stance. As a result, we expect mineral royalties to become a hot topic for the upcoming 2016 Presidential election and for mining policy uncertainty to remain high.

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