

# Zambia Mining Report Q4 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

The country's political uncertainty will continue to play a big role in whether future investment will materialize. For instance, over the first six months of 2015, the mining code was adjusted three times, increasing uncertainty among existing and potential long-term investors in the sector. In our view, miners will become increasingly concerned about the uncertain political climate and will limit or halt new projects from coming online altogether.

The volatility of power supply in hydropower-reliant countries will also warrant investor caution in energy intensive sectors across the region. For example, Zambian power supply deficits had a detrimental impact on mining operations in the country's Copperbelt (see 'Challenges To Come From All Sides', October 25 2015). Widespread load-shedding in Zambia made power exports politically toxic for the Zambian government (see 'Electricity Shortages To Curb Katanga Mining Industry', September 17 2015). Previously, poor rainfall levels over 2014-2015, forced the government to ration water used in power generation, reportedly costing the state-owned utility Zesco USD116mn thus far in 2015. Given that hydropower accounts for over 90% of total electricity generation, any fluctuations in the weather will have a negative impact on Zambian power output (see: 'Eastern Interconnections To Improve Energy Security' July 16 2015).



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