



International Manganese Institute

The International Manganese Institute: Guide to Services

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IMnI EPD Workshop
Hilton Hotel, Chongqing - Sept. 13, 2009





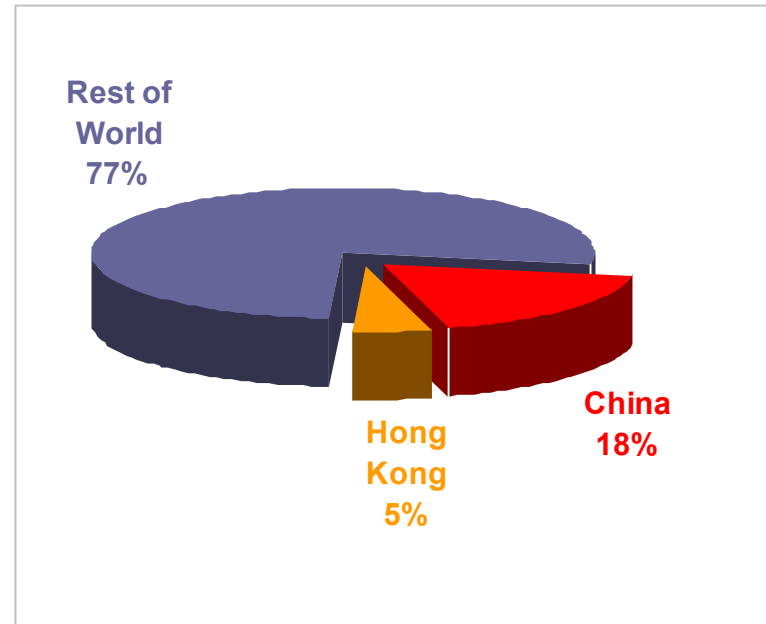
A Few Facts about IMnI

- IMnI represents Mn Ore & Alloy Producers, Traders and Companies involved in Mn business development
- 80 Members in over 30 countries
- Headquartered in Paris, France
- Staff of 6
- A China Representative, Li Yongzhi: li@manganese.org



A Few Facts about IMnI's China Membership

- *14 Members from Mainland China*
- *4 Members from Hong Kong*



- 2 IMnI Officers from China:
 1. Wang Feng – Chairman, Marketing and Communications China Sub-Committee (Minmetals)
 2. Li Weijian – Vice-Chairman, EPD Committee (Citic Dameng)



Overview of IMnI's Services

- Events & Conferences
 - Organizes worldwide industry gatherings, including the biggest global Mn event for networking & learning: IMnI's Annual Conference
 - events@manganese.org
- IMnI Mn Publications
 - Mn Matters – Twice Monthly industry Newsletter
 - IMnI China Weekly Report
- Market Research & Statistics
 - Provides the most comprehensive reports & tools available on Mn supply, demand and trade flows
 - Market Analyst Mark Camaj: stats@manganese.org
- Occupational, Health, Environment & Safety
 - Develops and promotes universal best practices for a sustainable Mn industry
 - OHES Manager Dr. Doreen McGough: ohes@manganese.org
- REACH Mn Consortium – managed through MARA (independent association)
 - Consortium Manager Dr. Keven Harlow: reach@manganese.org



IMnI's Services

- Events & Conferences

- Organizes worldwide industry gatherings, including the biggest global Mn event for networking & learning:

IMnI's Annual Conference

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IMnI's Events & Conferences



IMnI's EPD China Conference

- Dedicated to Electrolytic Mn Metal (EMM) and Electrolytic Mn Dioxide (EMD) Markets
- In March 2009 IMnI's 6th EPD Conference was held in partnership with the 4 biggest EPD associations and organizers in China
- Has become the global event for the EMM and EMD Industries
- Expert speakers and panel discussions covering both the EPD markets as well as the downstream Stainless Steel and Alkaline Battery markets
- IMnI continues to develop brand recognition and gain the support of major EPD stakeholders in China

To see presentations please visit: [http://www.manganese.org/2009 EP_D_Conference_Presentations.php](http://www.manganese.org/2009_EP_D_Conference_Presentations.php)



IMnI's Events & Conferences

IMnI's Annual Conference



- Acknowledged by major manganese players as the 'premier' annual event dedicated wholly to Manganese
- 'Moving' venue to ensure all important Mn regions have the opportunity to participate and bring industry closer together globally
- Expert speakers and discussions makes the event a learning process, where industry can share information on market trends and best practices
- Networking opportunity is not to be missed with an average of over 150 Mn dedicated delegates in attendance

To see presentations please visit: http://www.manganese.org/2009_AC_Presentations.php



IMnI's
36th ANNUAL
CONFERENCE
Paris
June 11 – 13, 2010



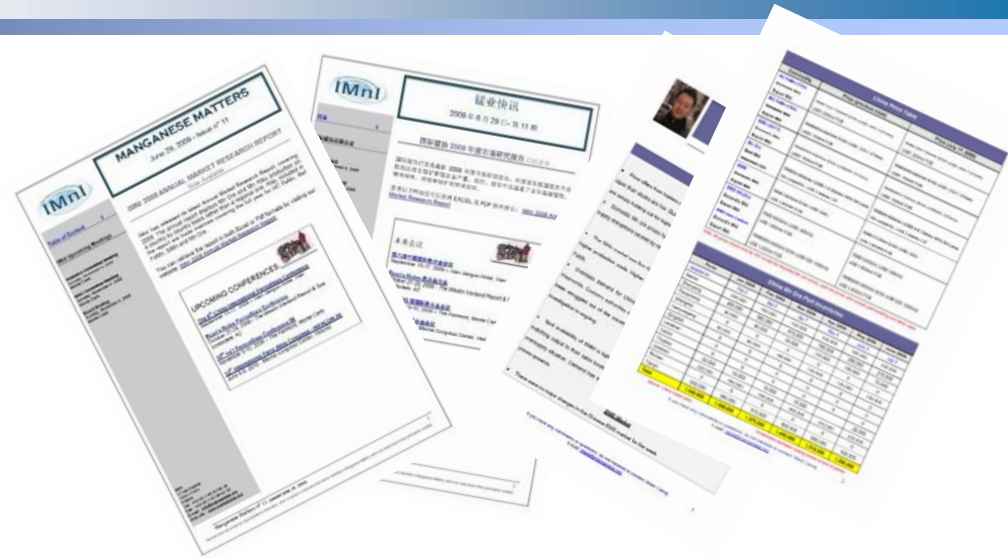
- PARIS
- Friday, June 11 – Sunday, June 13
- 2 Morning Conference Sessions
- International experts to speak
- A great opportunity to learn & network
- And to enjoy the most beautiful city in the world

Hope to see you next year!

events@manganese.org



IMnI's Services



IMnI Mn Publications

- Mn Matters – Twice-monthly industry Newsletter: includes all major global coverage of the Mn industry, published in both English and Chinese
- IMnI China Weekly Report – direct from IMnI's China desk: includes news, prices and port inventories, published in both English and Chinese
- Both Publications cover the Mn Ore, Mn Alloys, Electrolytic Mn Metal (EMM) and Electrolytic Mn Dioxide (EMD) Markets



IMnI's Services



- Market Research & Statistics
 - Provides the most comprehensive set of reports & tools available on Mn supply, demand and trade flows
 - Market Analyst Mark Camaj: stats@manganese.org



IMnI's Market Research & Statistics - Reports

Market Research Reports: for Mn Ore and Mn Alloys

- 4 Quarterly reports
- 1 Annual report

Trade Reports: for Mn Ore, Mn Alloys, EMM and EMD

- Monthly reports covering both imports and exports (country by country)

Online Data Query & Database: Easy access to data online

Various Special Reports: Offering deeper insight into industry fluctuations



IMnI's Market Research & Statistics - Data Sources

Data directly from members:

- Major ore and alloy producers submit production, inventory and sales data directly to IMnI Market Analyst

Access to top data providers:

- Best available trade data - GTIS
- Journals and services covering regions where local market information is less reliable
- IMnI China Representative has access to the best available China statistics & a wide range of sources

Large network within industry:

- Large network within Mn world – service providers, journals and other useful sources



EMM Trade flows – Trade Matrix 2008

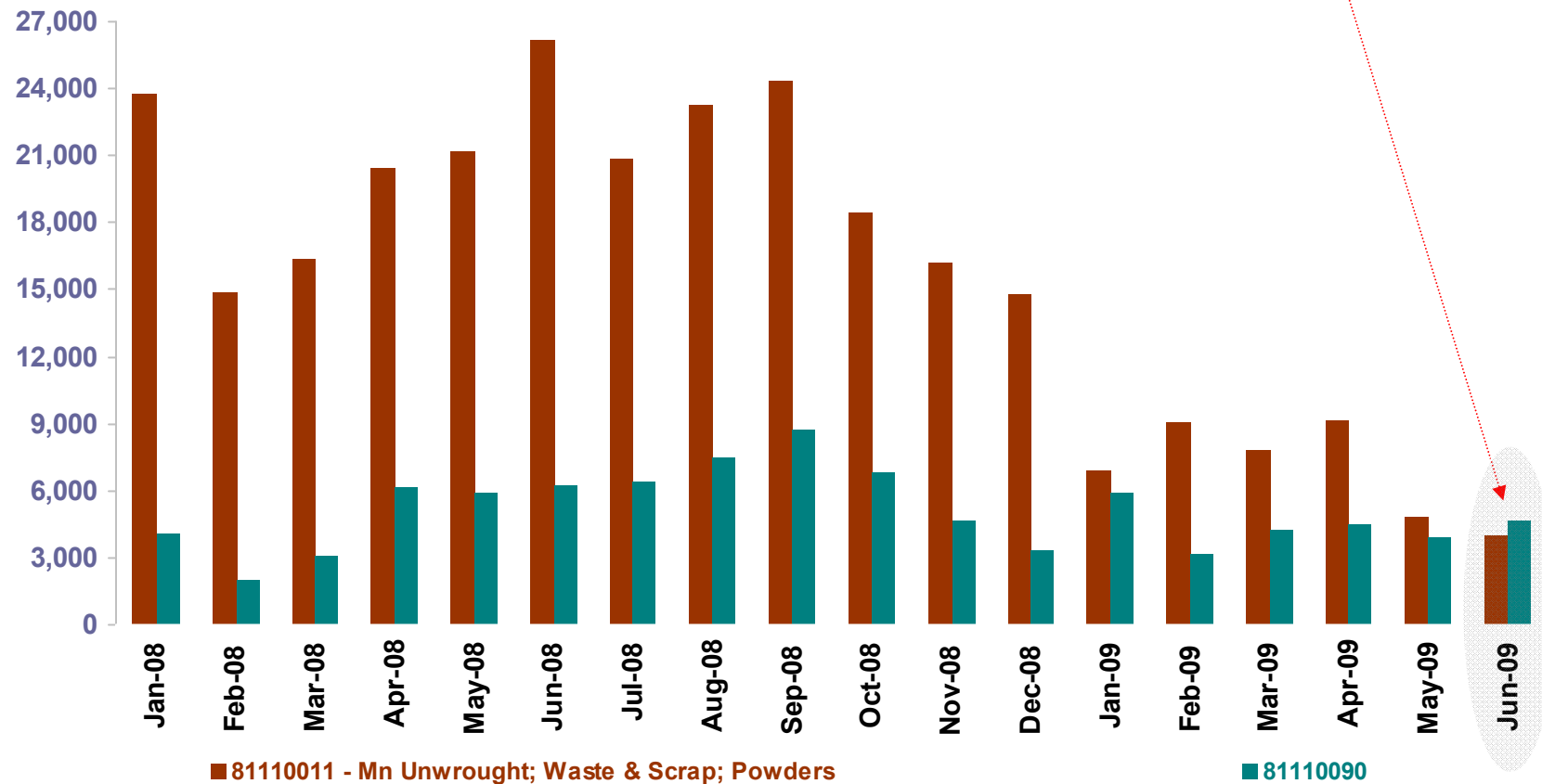
- Two EMM producing Countries: China & South Africa
- The EU and China's neighbors are biggest importers

Declared Importer	Deduced Exporter				Total
	China*	Netherlands	South Africa*	Other	
Netherlands	71,956		2,839	3,839	78,634
South Korea	72,146		969	147	73,262
Japan	59,956		6,351	515	66,822
Germany	11,444	21,956		14,182	47,582
Russia	33,270	74	17	824	34,185
United States	23,708		5,566	4,710	33,984
France	1,158	7,671		10,404	19,233
Austria	200	5,716		8,307	14,223
Brazil	7,523		3,091	201	10,815
Canada	6,747		1,729	2,133	10,609
Spain	9,093	253		691	10,037
United Kingdom	4,535	637	607	3,086	8,865
India	8,564			205	8,769
Taiwan	7,232		396	8	7,636
Ukraine	6,827	80		51	6,958
Italy	3,144	1,420		1,278	5,842
Other	14,536	7,551	675	11,220	33,982
Total	342,039	45,358	22,240	61,801	471,438



EMM Trade flows – China Exports

- 20% export duty not applicable to articles of EMM (trade code 81110090)
- Exports of articles of EMM surpassed Mn flake (81110011) in June 2009 for the first time





EMD Trade flows – Major Exporters

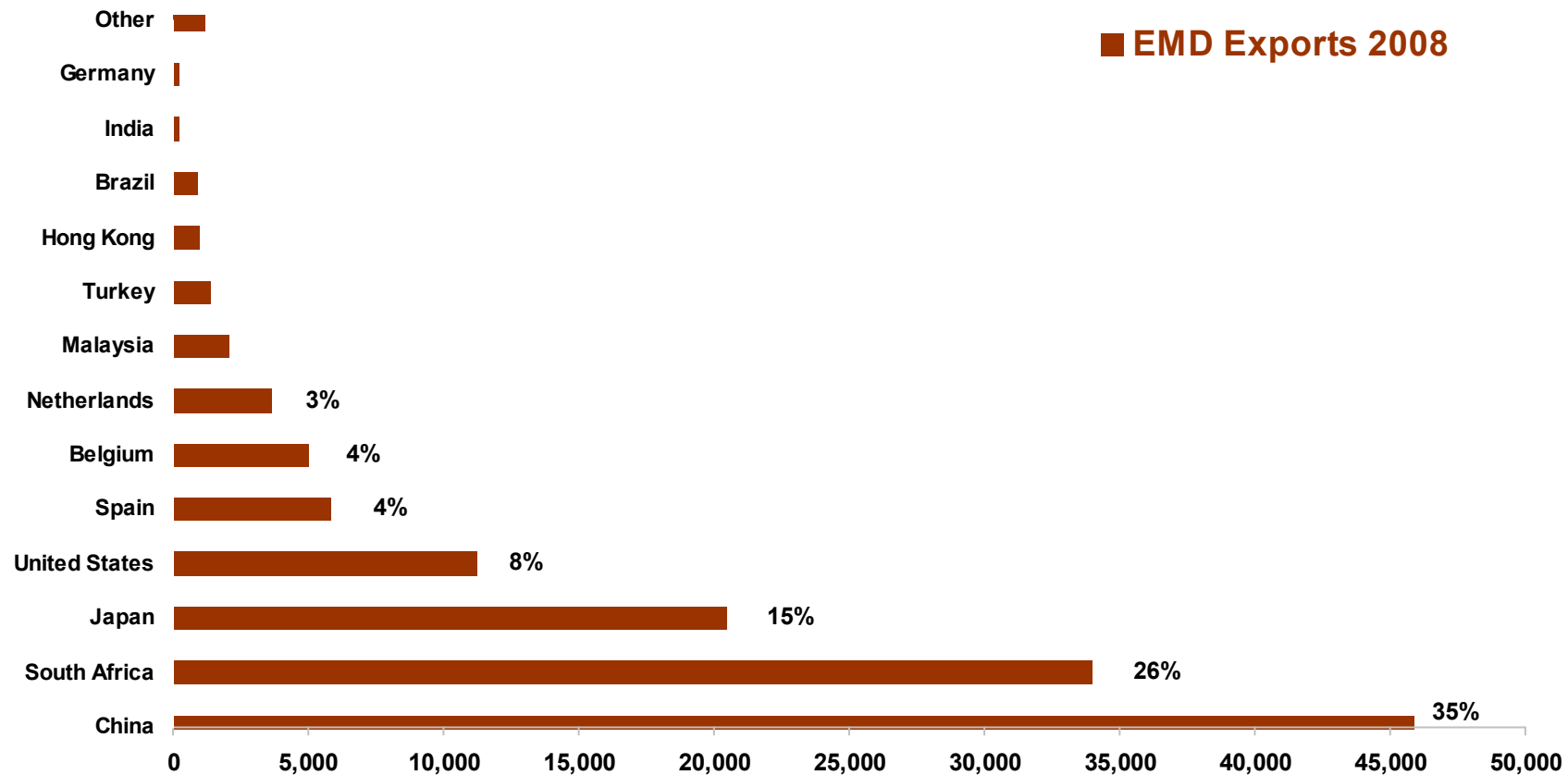
- Average annual exports of EMD for over the last 3 years was: 135K mt
- 92% of 2008 EMD exports were accounted for by the top 6 countries

Reporting Exporter	Annual 2006	Annual 2007	Annual 2008
China	55,615	49,997	45,916
South Africa	25,702	23,163	33,963
Japan	29,341	24,138	20,485
United States	6,063	9,403	11,210
Spain	5,444	7,741	5,794
Belgium	4,334	3,605	5,033
Netherlands	370	1,076	3,608
Malaysia	36	0	2,081
Turkey	2	2,200	1,357
Hong Kong	1,664	1,053	988
Brazil	2,601	1,238	870
India	780	430	206
Germany	1,234	381	194
Australia	12,114	0	0
Other	719	928	1,195
Total	146,019	125,353	132,900



EMD Trade flows – Top Exporters 2008

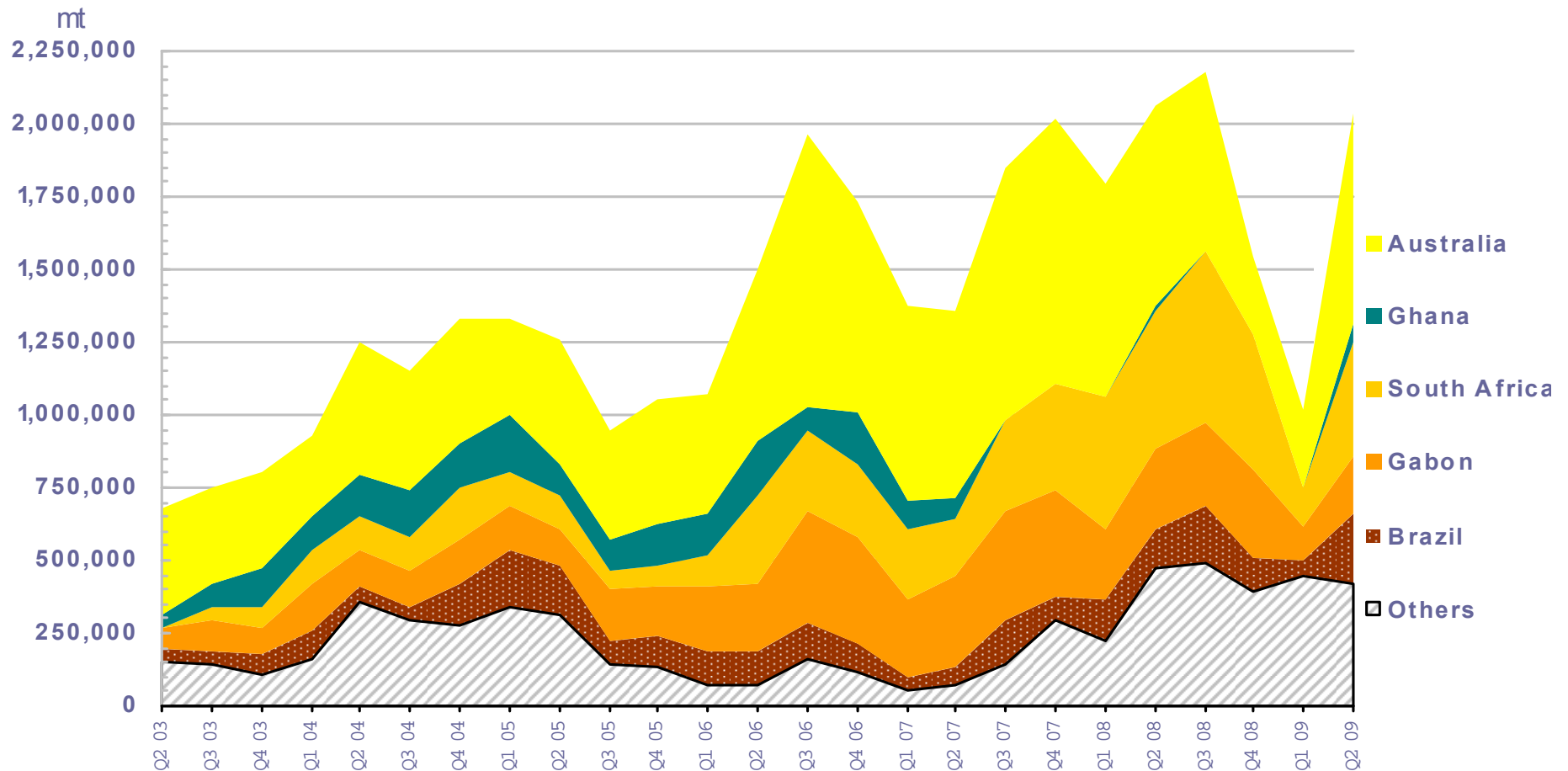
- China the biggest exporter – 46K mt in 2008 / S Africa was second with 34K mt
- Handful of major players outside of China – rivalry in EMD has been intense





Mn Ore – China Imports

- Imports into China in Q4 08 and Q1 09 fell off dramatically
- Q2 09 imports have shot back up to over 2 million mt in Q2 09



Source: GTIS



IMnI's Market Research & Statistics – Ore & More

Good Reasons for China EPD Producers to follow IMnI Mn Ore Stats:

- There are benefits to using higher grade ores, including higher yields and less waste
- China does not have high grade ore reserves. Chinese ore reserves are depleting at rapid rates due to heavy mining to support domestic Mn industries
- Environmental concerns and stricter regulations encourage cleaner and more efficient production processes
- Allows members to gain a clear understanding of the origin of seaborne ore supplies as well where they are exported to



IMnI's Services - OHES



- Occupational Health, Environment & Safety
 - Develops and promotes universal best practices for a sustainable Mn industry
 - OHES Manager Dr. Doreen McGough: ohes@manganese.org





IMnI's Occupational Health, Environment & Safety

MANGANESE HEALTH RESEARCH PROGRAM (MHRP)

Background:

- Funded by the US Dept of Defence (more than US\$5million); initiated & driven by the IMnI
- This 5-year programme (ending in January 2010) will have generated 17 separate studies, involving a total of over 100 scientists from the USA, Europe, Russia and China

Objective:

- To better understand the effects of Mn on human health and fill in knowledge gaps



IMnI's Occupational Health, Environment & Safety

MANGANESE HEALTH RESEARCH PROGRAM (MHRP)

Outcomes to date:

- The results of most of the studies were presented at the MHRP Showcase Conference held outside Washington, D.C, at the end of June '09

A few details from the conference:

- Dr Wei Zheng : University of Purdue, USA, working on exposed Chinese workers in the city of Zunyi concluded that, blood Mn/Fe ratio may be a more reliable biomarker than blood and urine
- Dr M. Aschner : Vanderbilt U. Medical Centre, USA study demonstrated that Fe deficiency increased the uptake and deposition of Mn in the brain.

An overview of the conference can be seen on IMnI's website:

www.manganese.org



IMnI's Occupational Health, Environment & Safety

A STANDARDISED METHOD FOR MEASURING Mn EXPOSURE

Background:

- Contracted to the Institute of Occupational Medicine in Edinburgh, the project aims to produce a harmonised methodology for measuring Mn exposure across the industry
- By using a standardised method, comparisons of the level of Mn exposure on workers between sites, companies & countries can be carried out with greater confidence & security

Objective :

- To protect our workers.



IMnI's Occupational Health, Environment & Safety

A STANDARDISED METHOD FOR MEASURING Mn EXPOSURE

Outcomes to date:

- A review of available literature on sampling methodology and a questionnaire survey of IMnI members revealed that the methodology used for Measuring Mn exposure across sites & industry is extremely variable
- The proposed methodology is currently being validated through field surveys of smelter plants across Europe and Africa



IMnI's Occupational Health, Environment & Safety

THE MANGANESE SUSTAINABILITY PROGRAM

Background:

- IMnI is at an exciting and critical stage in developing a sustainability program aimed at highlighting our present needs while still taking into consideration the needs of future generations

Objective:

- To highlight IMnI's areas of improvement
 - Contracted to Hatch, the Toronto consulting firm benchmarked IMnI with other metal associations such as European Aluminium Association, Nickel Institute, International Copper Association, World Steel Association and others



IMnI's Occupational Health, Environment & Safety

THE MANGANESE SUSTAINABILITY PROGRAM

Outcomes to date:

- IMnI's strengths and weaknesses from the bench-marking exercise:

- In public health and safety we are well above the metal industry average
- On environmental issues, we have decided to move quickly by launching

3 new projects common to other metal and mining commodities

3 new projects:

- Lifecycle Assessment : From mining to Mn alloys – cradle to gate.
- Facilitating Sharing of Best Practice: Disposal/recycling of solid waste
- Climate Change: The impact of climate change policy on the Mn industry must be understood



IMnI's Services

REACH Mn Consortium

Managed by: Dr. Keven Harlow

through MARA (an independent association)

- www.mn-consortium.org
- reach@manganese.org





REACH – the EU’s new regulation for chemicals

- NOT only about chemicals !
- ...driven by substances, including metals and alloys.
- An EU Regulation from 1 June '07: after 8 years planning.
- A new agency (ECHA) in Helsinki to manage the process.
- In simple terms: each substance manufactured in or imported into the EU ≥ 1 tpa is subject to REACH and must be registered with the ECHA.
- Registration deadlines: **2010 ≥ 1000 tpa**, 2013 ≥ 100 tpa, 2018 ≥ 1 tpa.
- Note: "no data, no market" – a licence to trade within the EU



REACH – the EU’s new regulation for chemicals

- Registration responsibility lies only with the EU legal entity that imports or manufactures a substance.
- The pre-registration phase closed at the end of 2008 – this allowing companies more time to gather the necessary data for registration.
- If your EU importer has not pre-registered he must stop trading immediately until he has submitted a full registration.
- The first registration deadline is next year (Nov 2010) for substances imported at >1,000 tpa per EU legal entity.
- The IMnI’s REACH Mn Consortium is working to assist its Members in meeting their registration requirements.



REACH Mn Consortium

- Now with 43 members representing a significant share of the EU's Mn and Fe(Si)Mn producers and importers.
- Benefits of joining the Mn consortium include:
 - dedicated and knowledgeable help from the consortium's REACH team
 - Members share resources, expertise and cost
 - A clear, structured, co-ordinated, well managed association
 - transparent cost-sharing and voting rights are specified
 - legal certainty through a consortium Agreement
 - data generated also useful for other global legislation
 - coordination with other metals' consortia
- See www.mn-consortium.org for more information



IMnI's Role going forward...

- The IMnI will increasingly strive to improve as a centre of excellence and mirror the size and importance of the industry.
- Increasing membership in Asia is one of our primary goals, so as to reflect the reality of the industry but also to create a level playing-field for all committed companies.
- IMnI aims to become a centre for coordinating and pooling resources to oversee projects regarding *sustainability*, ex. the industry's Life Cycle Assessment etc., as well as actively encourage research into *new applications* for Mn, such as high strength steels, new Lithium-ion Mn batteries and other opportunities.



International Manganese Institute



IMnI provides vision and guidance to the manganese industry by promoting economic, social and environmental responsibility and sustainability for all stakeholders.

Market Research & Statistics

Provides the most comprehensive reports & tools available on manganese supply, demand and trade flows.

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Thank you!

Happy to answer any questions!