



IMnI & THE Mn INDUSTRY 2001 – 2005

Anne Tremblay, Secretary General, IMnI

IMnI 2nd China Seminar

Huatian Hotel

Changsha, March 20, 2006

IMnI At A Glance

International Mn Industry Association

Members are:

- Mn ore & Alloy Producers
- Producers of EMM & EMD (EPD Division)
- Manufacturers of Mn-based products
- Traders
- Service providers
- Universities & Research Institutes

IMnI Membership 2001 – 2005

2001 Membership

- Total = 32
- Countries = 16
- Asia (Japan) = 9
- PRC & HK = 0
- PRC = 0

Asia (Japan) = 28 %

Hong Kong = 0 %

PRC = 0 %

2005 Membership

- Total = 61
- Countries = 29
- Asia Members = 29
- PRC & HK = 16
- PRC = 12

Asia = 47.5 %

Hong Kong = 6.5 %

PRC = 19.7 %

IMnI Services 2001 – 2005

New & Better Services Added Since 2001

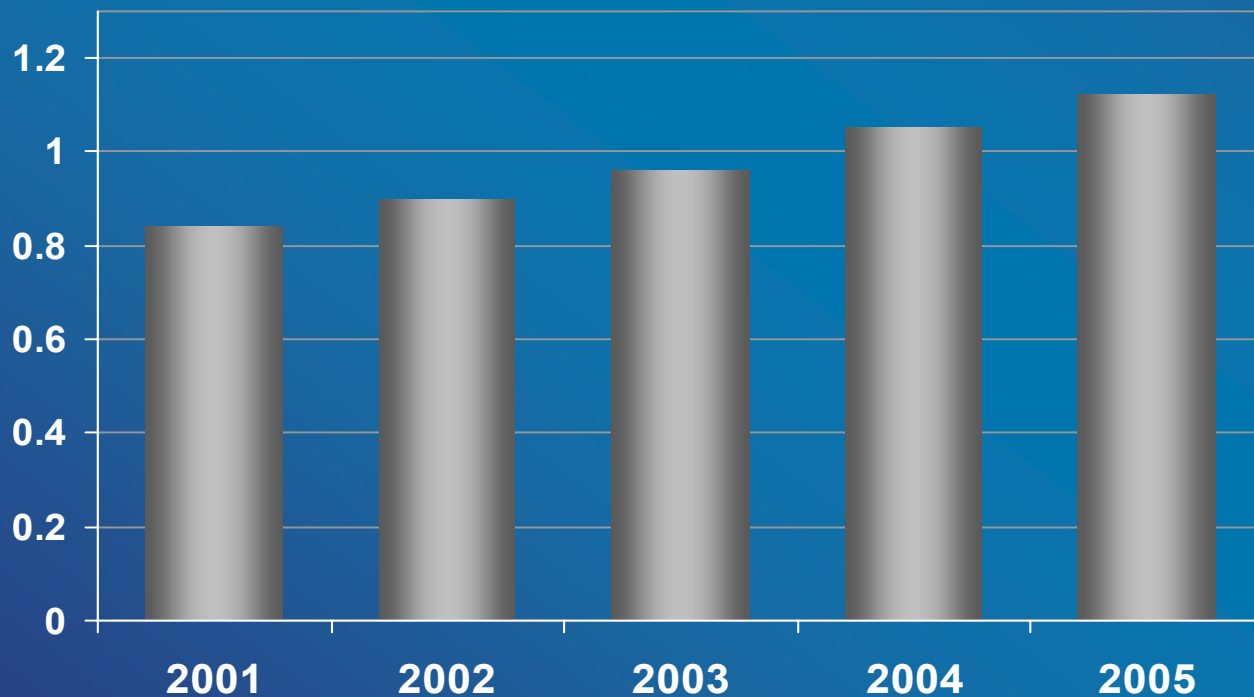
- Market Research Reports
- *Manganese Matters* published twice a month
- EPD Monthly Edition of *Mn Matters*
- English Web Site expanded & Chinese Web Site created
- China Seminars (Ore & Alloy and EPD Editions)
- Strong Support for members on Health, Safety & Environment Issues
- Annual Conferences now an industry “must”

The Mn Industry at a Glance 2001 – 2005

- China takes the place as dominant producer and consumer of Mn alloys
- Strong growth in global alloy and ore demand: average 9%/yr
- Relatively little consolidation (as compared to the steel industry)

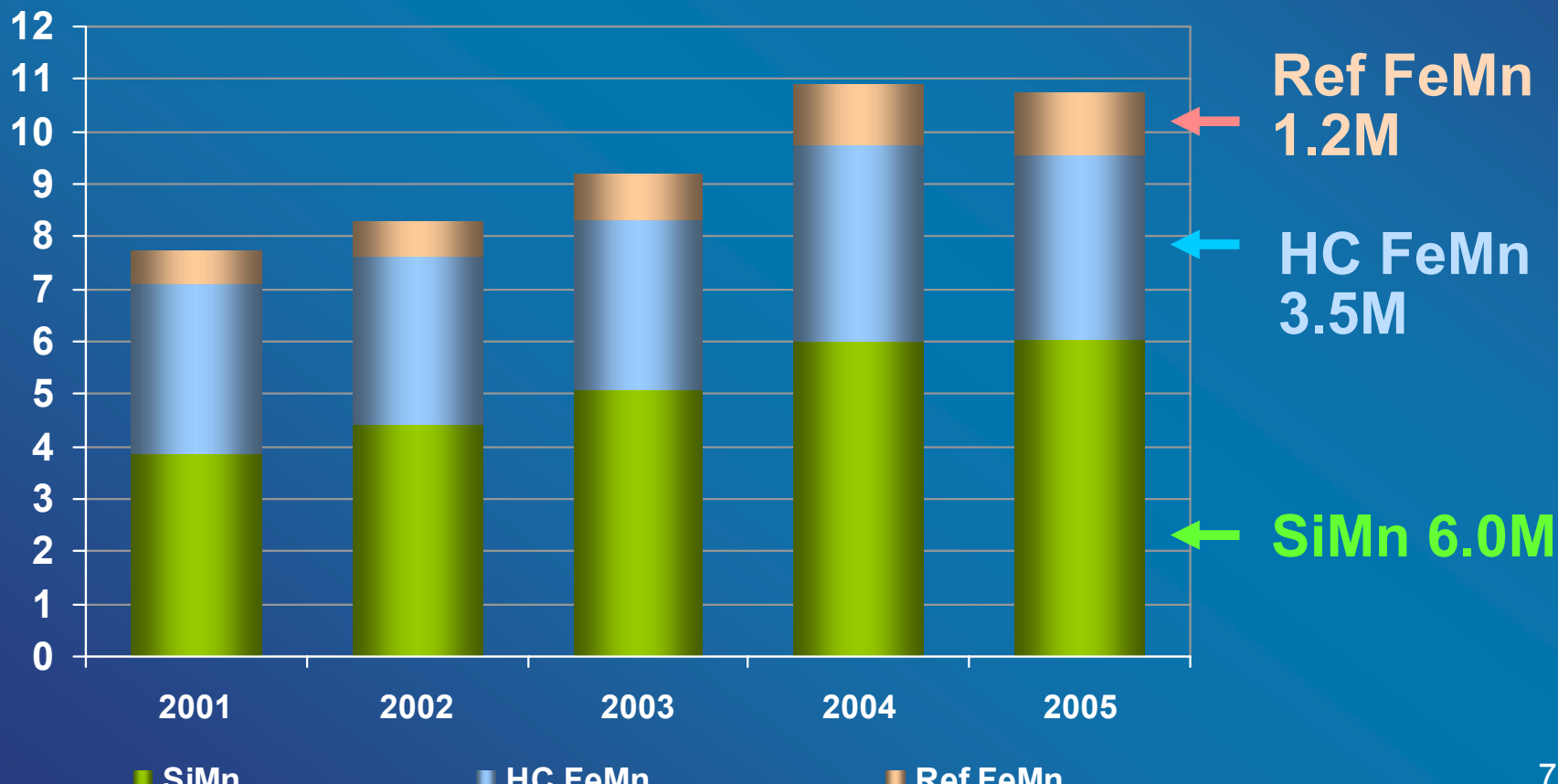
World Crude Steel

- 2005 1.12 Billion mt - a 33% Increase (280 M mt)
- An additional 2.8 M mt of annual alloy demand since 2001



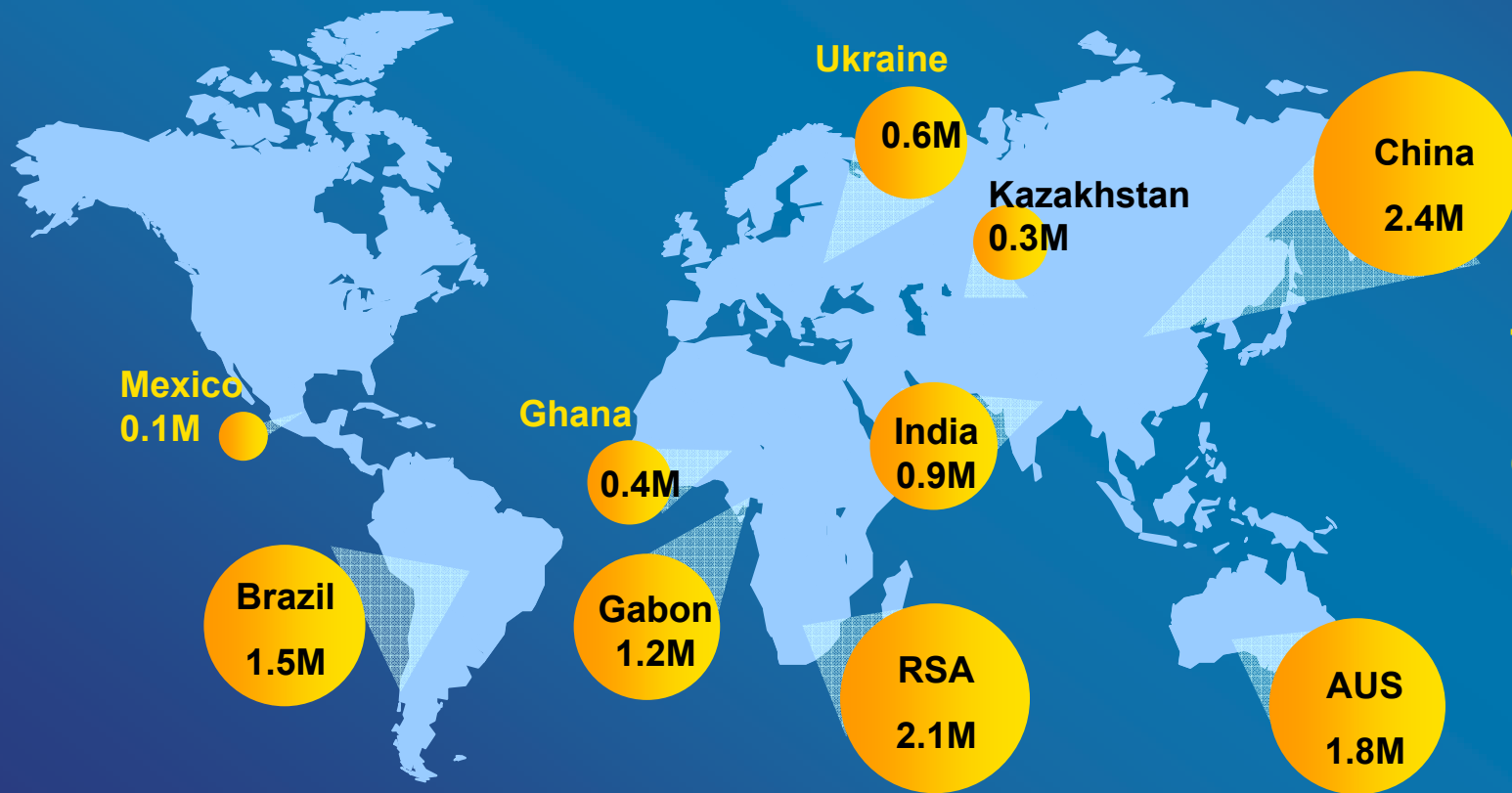
Mn Alloy Production 2001 - 2005

Mn alloy production up 38% since 2001 to 10.7 M mt



Mn Ore Production 2001 - 2005

Mn ore production up 49% since 2001 to 34.7 M mt (11.8 M mt in Mn Content)



Top 10 producing countries in Mn Content

2005 Mn Industry Overview

- Chinese alloy and ore production up
- Elsewhere, alloys down, ore up
- New Prospecting Rights awarded in RSA
- Overcapacity in Chinese Steel Production
- Nikopol ownership uncertain

IMnI 2006 Annual Conference

June 9 – 10: Technical Tours

Theme is “Environment & Safety Standards & How Host Companies Address Them”

June 9: Plant Tour – Three Options

Metalloys Alloy Plant (Samancor)

Cato Ridge Alloy Plant (Assmang)

Mn Metal Plant (Manganese Metal Co. – MMC)

June 10: Kalahari Mine Tour

Mamatwan (Samancor)

Nchwaning 3 (Assmang)

IMnI 2006 Annual Conference

June 11 – 13 Conference in Cape Town

Theme: “Looking to the Future: Scenarios for 2025”

Top-Flight Speakers Making Presentations on:

Minerals & Energy Policy for the RSA

Corporate Responsibility for the Environment

The Mn Industry: Scenarios for 2025

New Developments for Mn

Potential New Mn Mine Developments in RSA

IMnI’s Market Research Report

And more ...

IMnI 2006 Annual Conference

The Mn Industry Forum

The Annual Conference is also:

- a unique networking opportunity
- an occasion to exchange views with all the major industry players from around the world
- a place to learn
- a place to socialize
- and **the** place to have your voice heard

IMnI 2006 Annual Conference

To Learn More About IMnI's Annual
Conference & to Register Visit:

www.manganese.org/cn/

(Simultaneous Translation Provided)

We Hope to See You in South Africa
in June!