



# China Mn Industry Overview

LI Yongzhi, IMnI China Representative

IMnI China Seminar

Huatian Hotel

Changsha, March, 2006

## IMnI in China

IMnI's China representative Mr. Li Yonzhi

Responsibilities:

1. Investigate local industry developments for IMnI's Market Research Analyst
2. Ensure Chinese members' voices are heard in the IMnI

## Services provided to Chinese members

- Chinese website: [www.manganese.org/cn](http://www.manganese.org/cn)



The screenshot shows the website interface in Chinese. At the top, there is a navigation bar with the IMnI logo and the text '国际锰业协会 International Manganese Institute'. To the right of the logo are flags for China and the UK, and links for '首页' (Home), '会员登陆' (Member Login), and '联系我们' (Contact Us). Below the navigation bar is a horizontal menu with items: '关于国际锰协', '市场调研', '健康、安全、环境和社会', '锰协活动', and '行业新闻'.

The main content area features a large heading: '国际锰业协会是 (IMnI) 一个代表全球锰矿和合金生产商, 锰系产品制造商、贸易商、工业服务商、大学及研究机构的非盈利性行业组织。' (The International Manganese Institute (IMnI) is a non-profit industry organization representing global manganese ore and alloy producers, manganese product manufacturers, traders, industrial service providers, universities, and research institutions.)

Below this is a section titled '锰协新闻' (IMnI News) with a list of four items:

- 2006年年会: 南非开普敦, 6月11-13日。详情请点击这里。
- 2005年8月30日, 国际锰业协会搬迁。更多信息请点击这里。
- 2005年年会报告下载, 请点击这里。
- 2004年年度回顾于4月份出版, 有中英文两种版本。

On the right side of the main content area, there is a vertical list of five categories, each with a small thumbnail image:

- 关于国际锰协
- 国际锰市场调研
- 健康、安全、环境和社会
- 国际锰协年度报告
- 锰协活动

At the bottom of the page, there is a footer with the following text: '首页 - 联系我们 - 地图' (Home - Contact Us - Map), '版权 2005 - 国际锰业协会' (Copyright 2005 - International Manganese Institute), '制作: Intendance Ltd. 打印该页' (Made by: Intendance Ltd. Print this page), and an 'Internet' icon.

- Quaterly & Annual reports in Chinese



## Mn Matters in Chinese



### 锰业快讯

2005-10-18 (第 18 期)

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**第 22 届国际神经毒害会议讨论锰健康研究计划**

第 22 届国际会议于 9 月 11—15 号在美国北卡罗来纳州的三角研究公园召开。这次会议的议题是锰。会议名为“当今过氧接触导致的健康问题”，由 Vanderbilt 大学的 Michael Aschner 博士主持。Vanderbilt 大学是锰健康研究项目的主要研究者。许多科学家和研究者得到了该项目的资金支持，他们已经开始提交论文。

之后，与会者会见了锰健康研究计划指导委员会和美国所养种的成员并就项目讨论并交换了意见。国际基金会秘书长、锰健康研究计划指导委员会的主任 Anne Tremblay 介绍了国际基金会以及为锰健康研究计划所做的工作。Kinghorn, Hilbert 和 Associates 的主任 John Hilbert 就假设过程向与会者做了简单说明。他认为国会可能会再一次拨款来增加锰健康研究计划 2006 年的预算。指导锰健康研究计划的 Colonel Brian Luckey 便军方对该计划充满信心，同时自己对该项目的效果充满了期待。

最后，该项目的研究者、Aschner 博士从科学角度介绍了锰健康研究计划的目的。他希望该计划能帮助科学家之间的讨论与合作。该项目的目标能够超越个体工程。Aschner 博士指出该计划会帮助培养新一代科学家，并由比得到美国环保机构（例如环境保护机构、国家能源部）的资金支持。他表示了自己对该项目的热情，并希望在未来几年后锰健康研究计划能够在锰危害评估领域有一席之地。

**国际锰协近期会议**

**执行委员会会议**  
 2005-11-1, 周二  
 上午 8 点 (巴黎时间)  
 电话会议

**统计委员会会议**  
 2005-11-14, 周二  
 下午 3 点—5 点  
 詹姆斯蒙特卡洛

**董事会**  
 2005-11-15, 周二  
 下午 2 点—6 点  
 詹姆斯蒙特卡洛

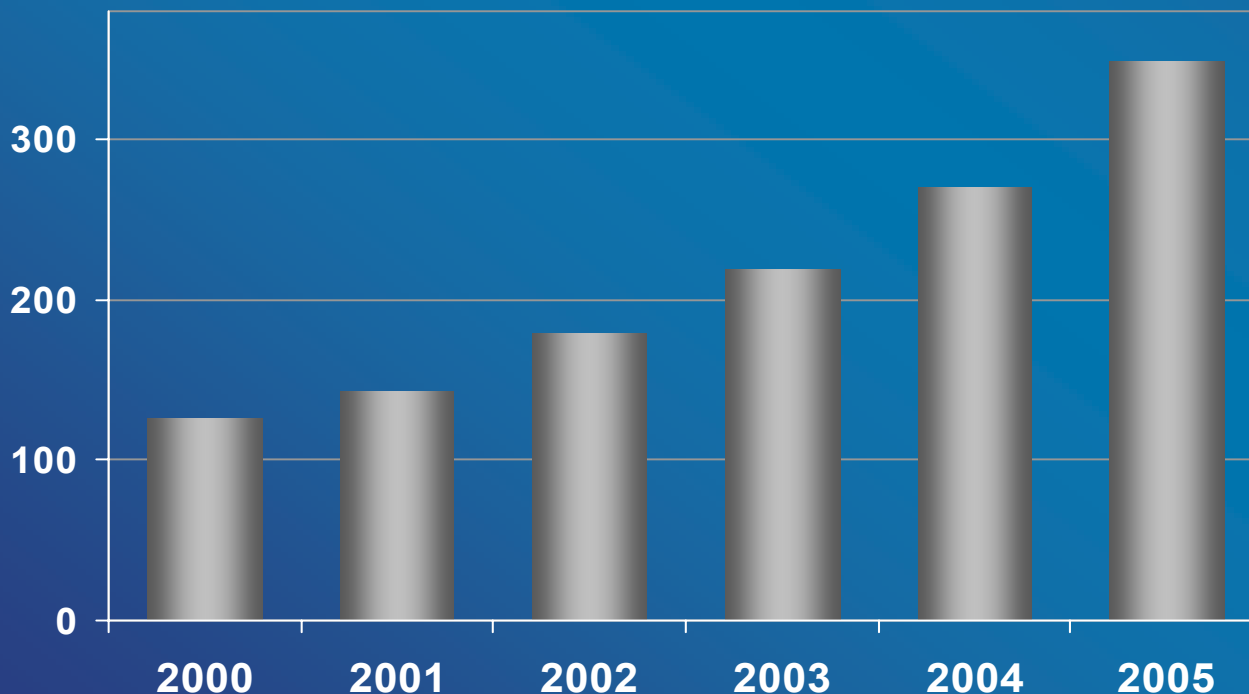
**美国认为锰可能会导致帕金森综合症**

## China Mn Alloys and Ore

- Steel production
- Mn Ferroalloys
- Mn Ore

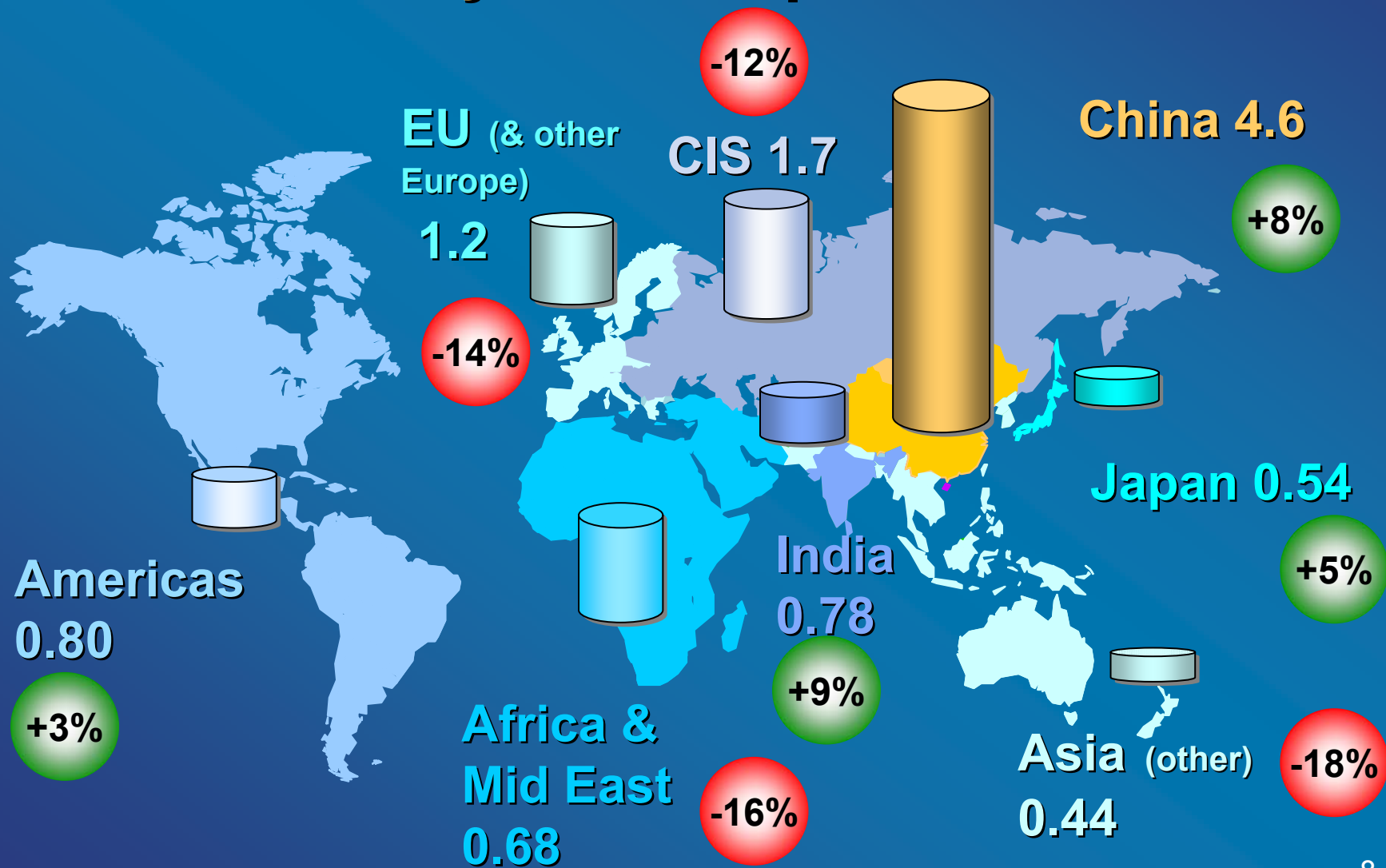
# China Steel

- 2005 348 M mt - a 28% Increase (76 M mt)
- 31% of World Production (1.12 Billion mt)



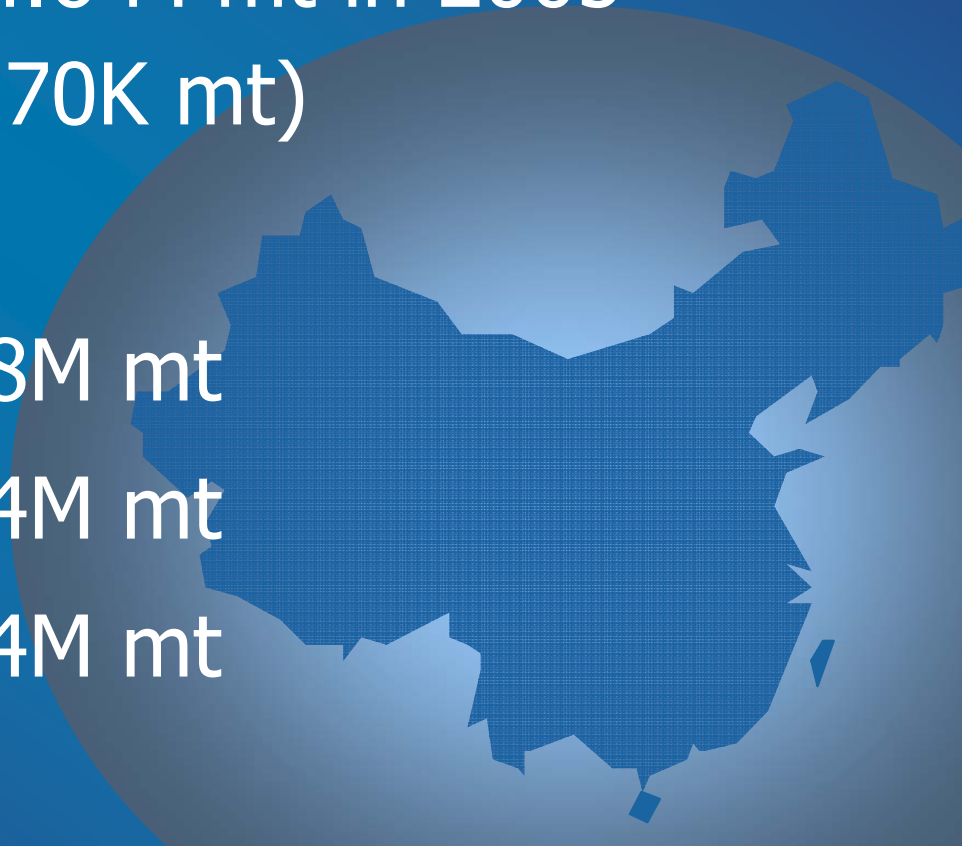
**76 M mt  
increase in steel  
production  
demanded  
additional 830K  
mt in Mn  
ferroalloys**

# China Mn Alloys in Perspective 2005 (M mt)



# China Mn Alloy Industry in 2005

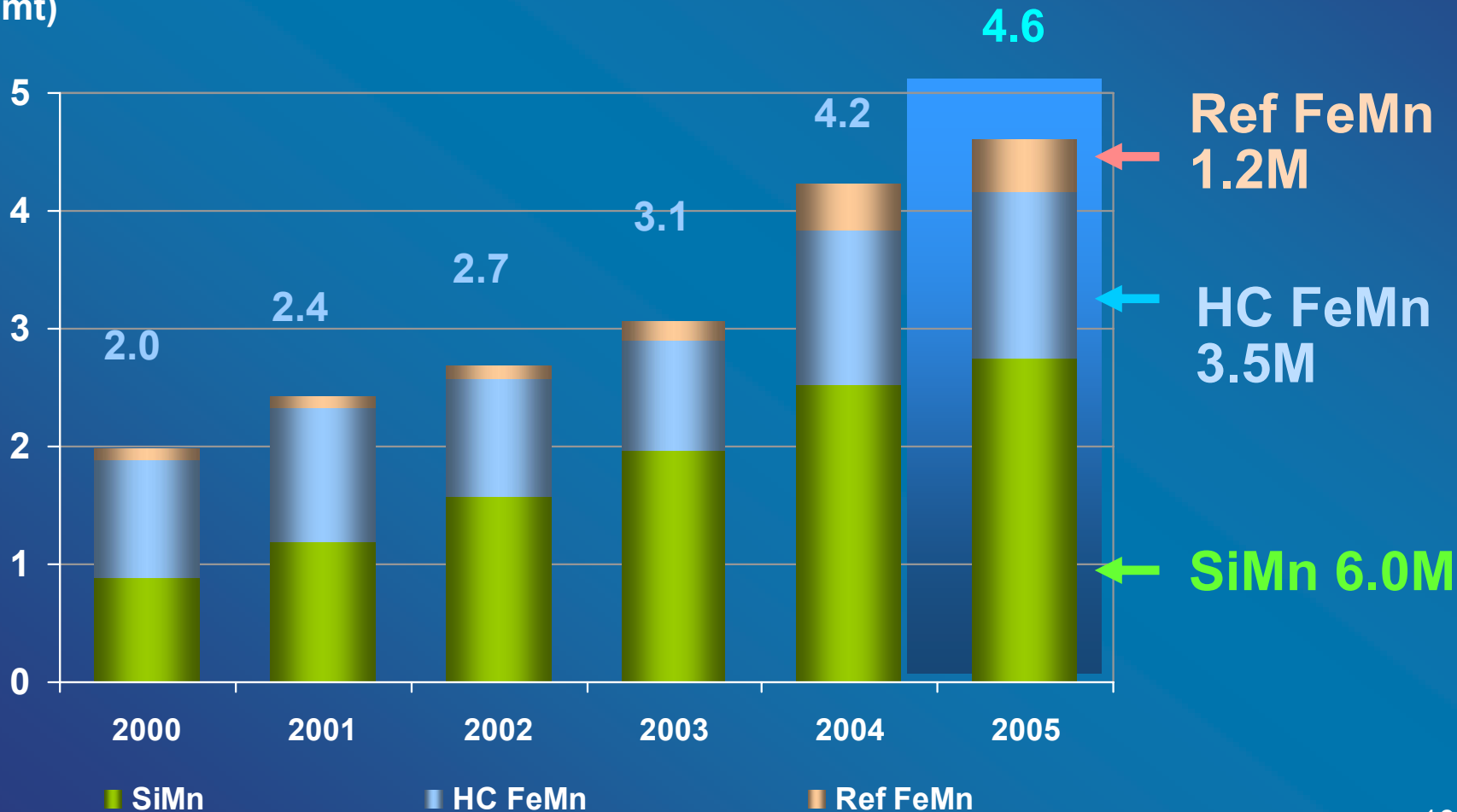
Total Production 4.6 M mt in 2005  
(8% increase, 370K mt)



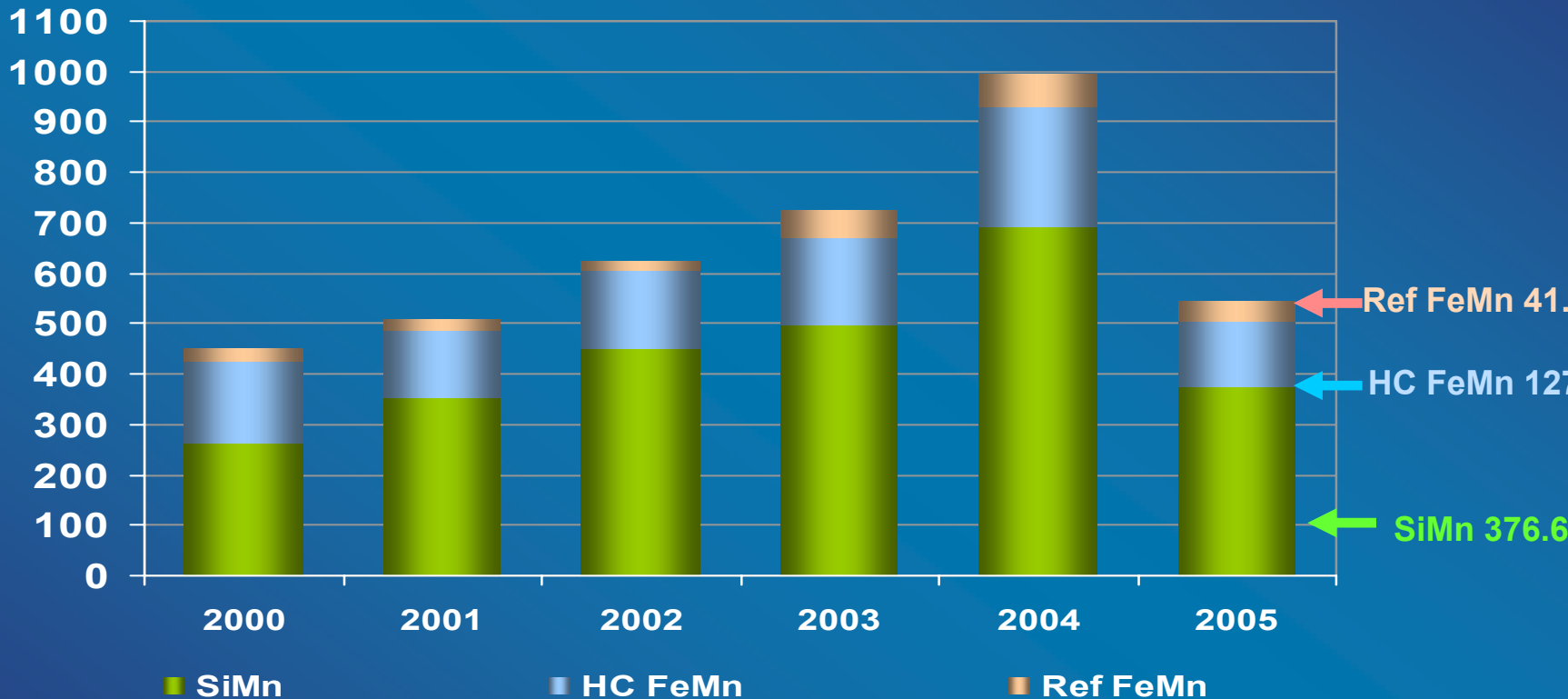
➔ SiMn	2.8M mt
➔ HC FeMn	1.4M mt
➔ Ref FeMn	0.4M mt

# China Mn Alloy Production (M mt)

(M mt)



# China Mn alloy exports (000 mt)



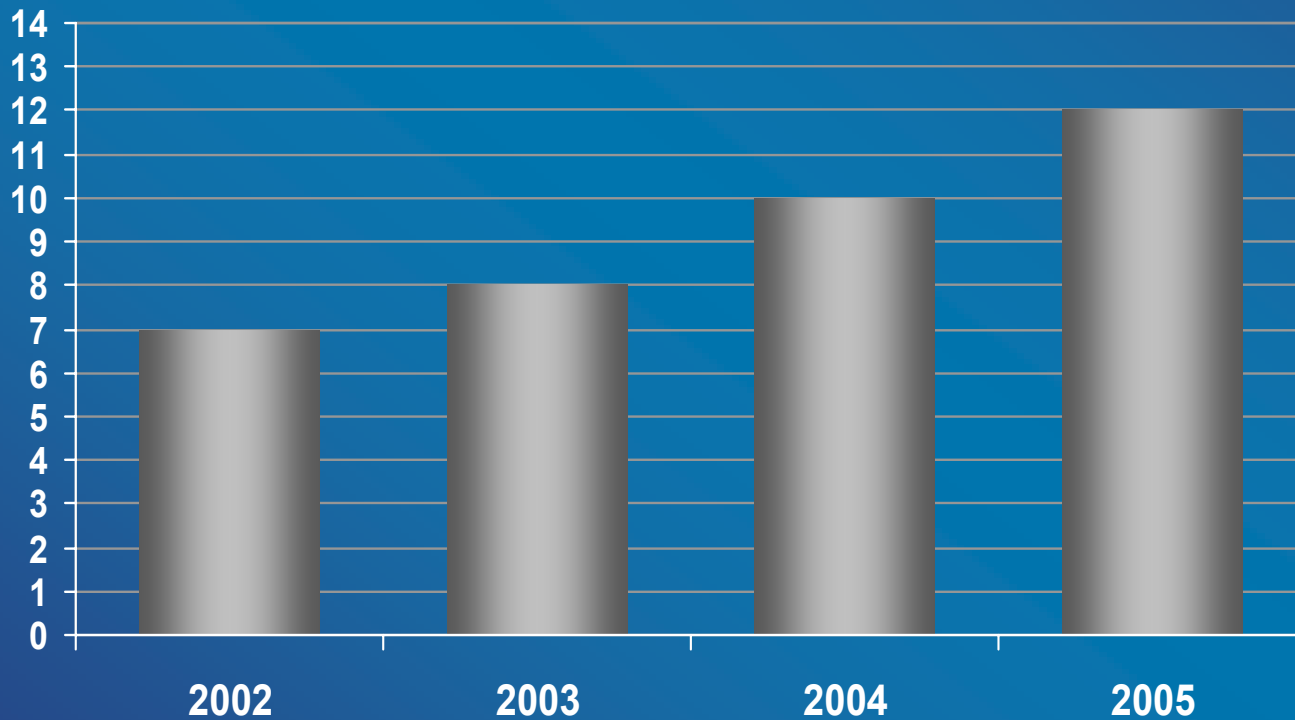
## China Macro Control Policy

- Restrict and postpone new projects
- Admission condition for ferroalloy producer effective on Jan.1,2005
- Eliminate export tax rebate scheme for manganese alloys
- Restrict the tolling trade
- Enact various pricing policies for electricity, raising the price for inefficient technologies and furnaces
- Tighten environmental protection measures

## What Has Been Achieved?

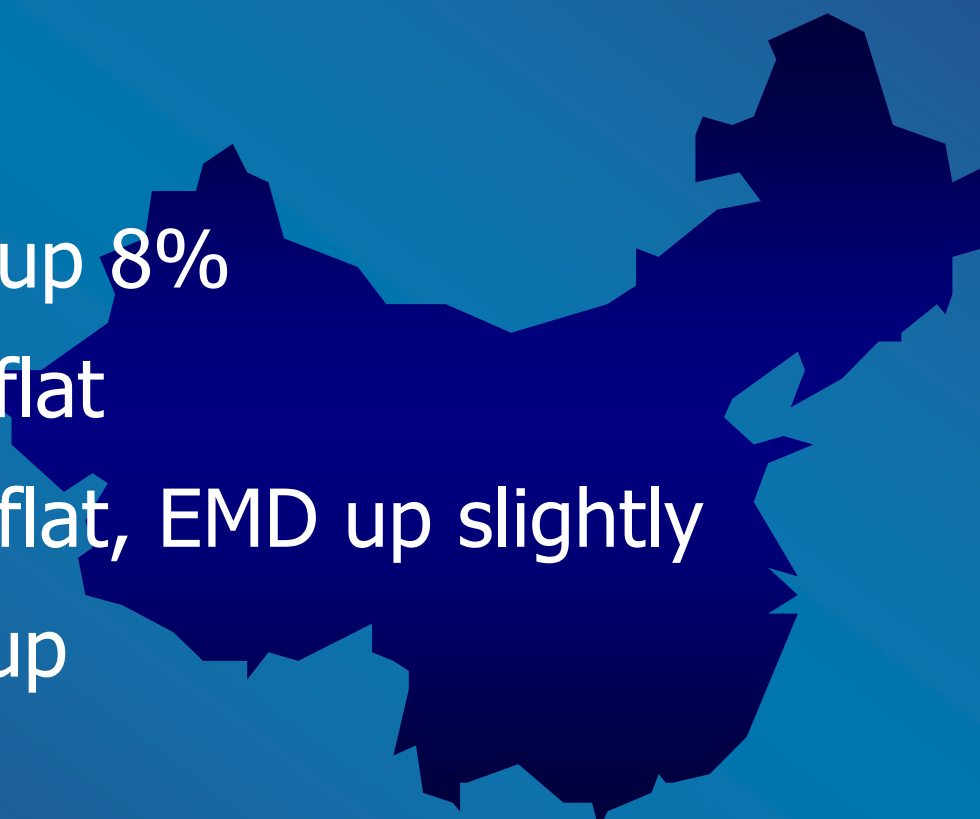
- Restrained the momentum of reckless investment, halted ongoing projects
- Reduced inefficient capacity
- Ferroalloy production growth slowed
- Exports drop significantly

# China Mn ore production (million mt)



## China Mn ore Market in 2005

Production of 12 M mt in 2005 – up from 10M in 2004

- ➔ Alloy production up 8%
  - ➔ Imports roughly flat
  - ➔ EMM production flat, EMD up slightly
  - ➔ Port inventories up
- 
- A dark blue silhouette map of China is positioned on the right side of the slide, partially overlapping the text. The map shows the outline of the country, including its major islands and coastlines.

# China Mn Ore Market in 2005 (M mt)

White Figures  
in Mn content

Alloy Real Cons (incl. EMM+EMD) 4.31

Net Imports -1.94

Port Inventory Increase 0.10

Net Inventory Changes -0.05

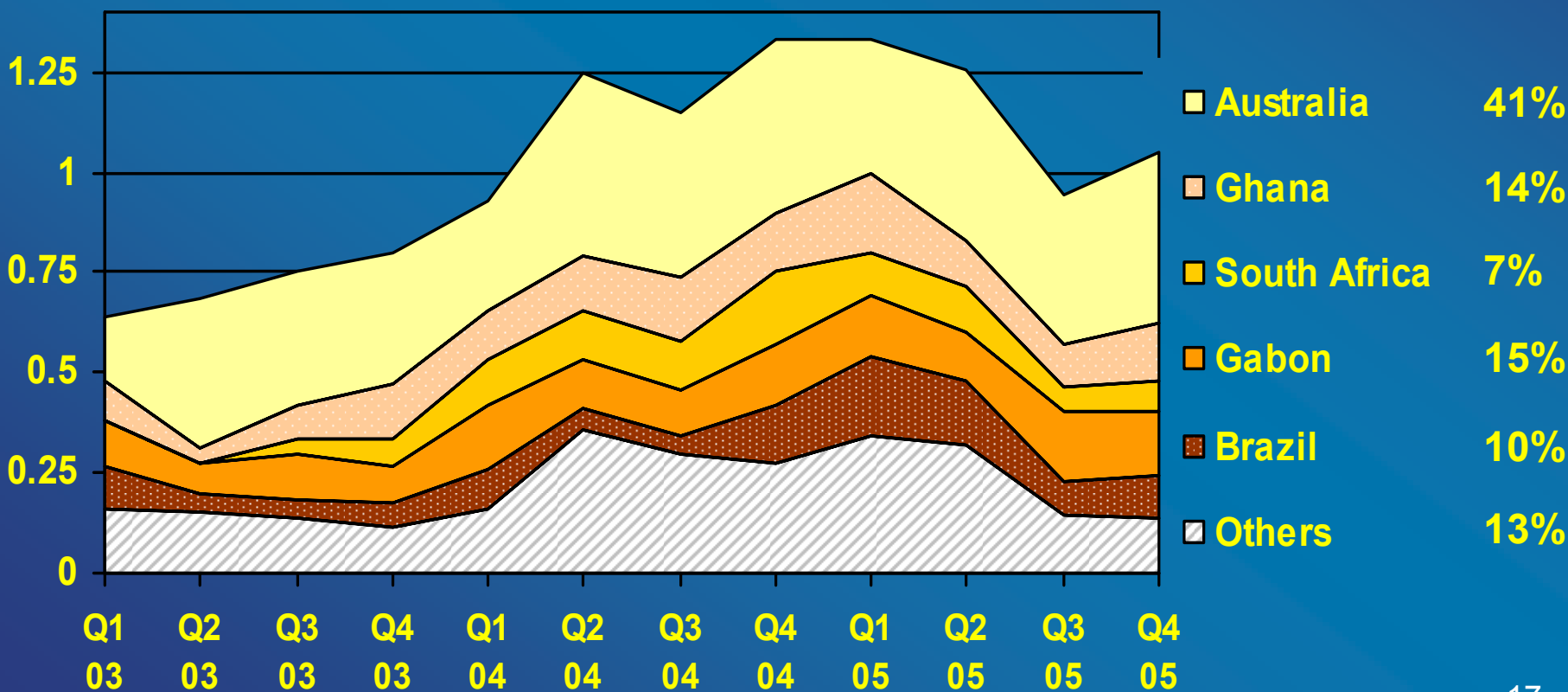
Domestic Ore Production 2.42

Domestic Ore Production (Wet mt) 12.0

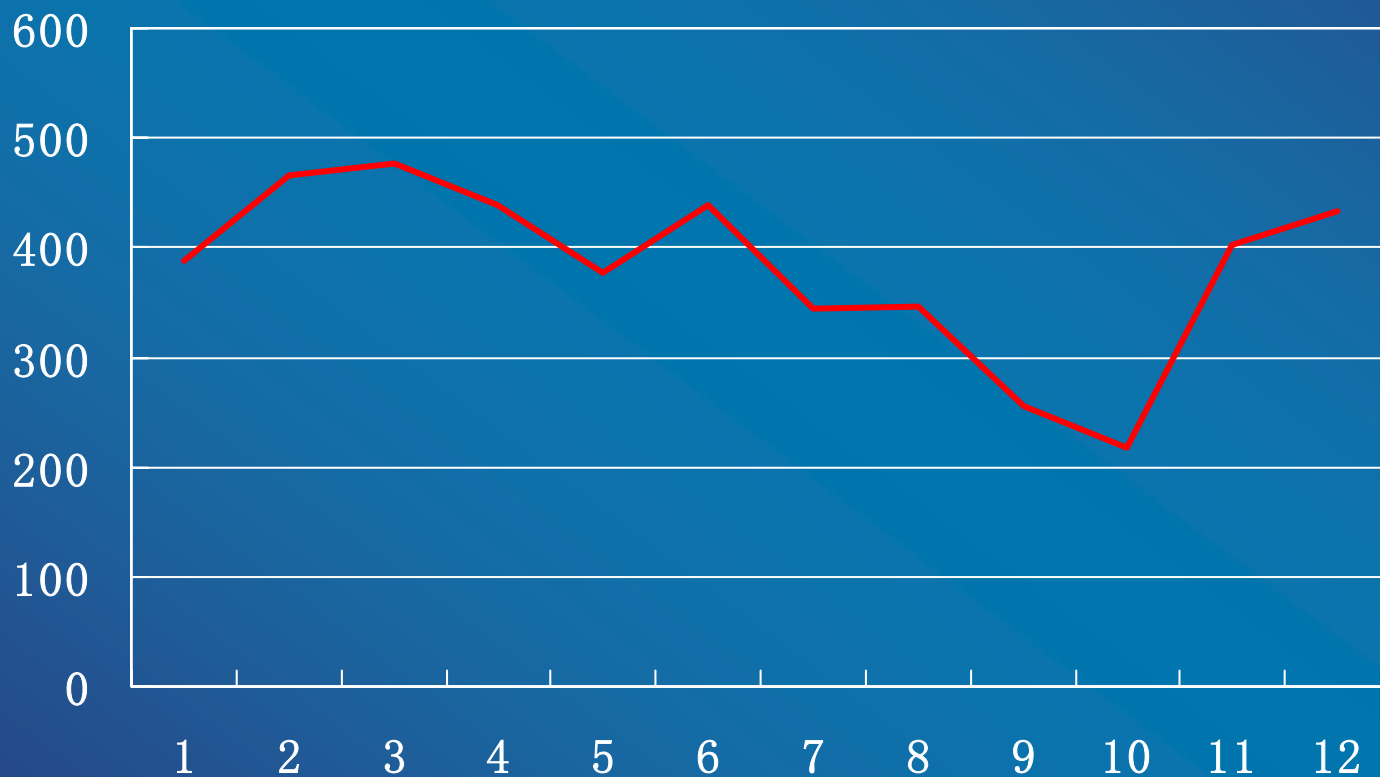
# Mn ore Imports into China (2003 -2005)

● 4.59 M mt ore imported in 2005

% of Total Imports



## Mn ore monthly imports 2005 (000 mt)



Source: China Custom

## Key Factors for China in 2006

- Steel production increase by 10%
- Macro-control further adjust the ferroalloy industry
- Electricity – lessened supply issues forecasted
- Environmental regulation