



International Manganese Institute

41st Annual Conference

Tuesday, June 16 - Thursday, June 18, 2015

THE PORTMAN RITZ-CARLTON

1376 Nanjing Xi Lu, Shanghai

PROGRAM

| Sunday, June 14 | | | |
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| Optional Technical Tour to Jinneng Alloy Operations -- Fengyu Ferroalloy Co. Ltd. | | | |
| Monday, June 15 | | | |
| Optional Technical Tour to Jiaocheng Yiwang Ferroalloy Co., Ltd. | | | |
| Tuesday, June 16 | | | |
| 09:00 | 10:30 | Statistics Committee Meeting | Appropriate members |
| 10:35 | 12:10 | Marketing & Communications Committee | Appropriate members |
| 15:10 | 18:00 | Supervisory Board Meeting | Appropriate members |
| | | Meeting Room: Huang Pu I | |
| Tuesday, June 16 | | | |
| | | Annual Conference | |
| | | Cocktail Room: Garden Terrace or Li Sao I-II | |
| 19:00 | 21:00 | Welcome Cocktail & New Members Ceremony | Sponsored by South32 |
| Theme: China at the Crossroads: Into the Mouth of the Dragon | | | |
| Wednesday, June 17 | | | |
| | | Annual Conference | |
| | | Meeting Room: Shen Ballroom I-II | |
| 08:20 | 08:30 | Welcome | Arnaud Tissidre, IMnI Chairman |
| Moderator: Lihuan Wang - Business Anchor at International Channel Shanghai (ICS) | | | |
| Session 1: | | | |
| 08:30 | 09:10 | China 2002-2015: Lessons Learned and What the Future Could Hold | James Kyng, Emerging Markets Editor Financial Times & Author of "China Shakes the World: The Rise of a Hungry Nation" |
| 09:10 | 09:50 | China's New Leadership Strategy & Economic Policies | Gao Xu, Chief Economist & Head of Economic Research at China Everbright Securities Co., Ltd. |
| 09:50 | 10:20 | Global Steel Overview: What is the Competition? (China in Overcapacity, USA Rebounding, Europe Lagging, India Struggling, etc.) | Emmanuel Bonnaud, Senior Partner, Roland Berger Strategy Consultants |
| 10:20 | 10:25 | Session wrap-up: Bob Qiu, Chief Marketing Executive, Tianjin Hoperay Minerals Co. Ltd. | |
| 10:25 | 10:50 | Tea Break | |
| Session 2: | | | |
| 10:50 | 11:20 | China's Steel Industry: What Are the Drivers? And How Will the Overcapacity Problem be Solved? | Graeme Train, Associate Director, Macquarie Commodities Research |
| 11:20 | 11:55 | Market Volatility's Impact on Global Electricity Prices and Oversupply in China's Energy Markets (Life after the Super Cycle) | Xizhou Zhou, Senior Director & Head of China Energy, IHS |
| 11:55 | 12:15 | POSCO's Development of High Manganese Steels | Jongsob Lee, Senior Vice President, Steel Business Division, POSCO |
| 12:15 | 12:40 | Freight: A Forward Look at Major Issues | Oscar Tjakra, Senior VP, Freight Research, Oldendorff |
| 12:40 | 12:45 | Session wrap-up: Pedro Larrea, IMnI Vice-Chairman (Chairman & CEO, Grupo FerroAtlantica) | |
| 12:45 | 14:30 | Lunch at "Tables" Sponsored by Nippon Denko Co., Ltd | |
| Optional Workshops - Registration Required | | | |
| 14:30 | 15:30 | GHS for "Dummies" Workshop (open to all conference delegates - registration required) | Doreen McGough, IMnI OHES Manager Meeting room "Shen Ballroom I-II" |
| 14:30 | 15:30 | IMnI Market Research for "Dummies" Workshop (open to all conference delegates - registration required) | Aloys d'Hambure, IMnI Market Research Manager Meeting room "Huang Pu II" |
| 15:45 | 16:45 | SDS for "Dummies" Workshop (open to all conference delegates - registration required) | Doreen McGough, IMnI OHES Manager Meeting room "Shen Ballroom I-II" |
| 15:45 | 16:45 | Only Representative (OR) for "Dummies" Workshop (open to all conference delegates - registration required) | Keven Harlow, IMnI Regulatory Affairs Manager Meeting room "Huang Pu II" |
| 17:30 | 22:30 | Group Outing and Banquet Dinner | |
| Thursday, June 18 | | | |
| | | IMnI General Assembly | |
| | | Meeting Room: Shen Ballroom I-II | |
| 08:00 | 09:00 | General Assembly | IMnI members only |
| Thursday, June 18 | | | |
| | | Meeting Room: Shen Ballroom I-II | |
| Session 3: | | | |
| 08:30 | 09:10 | A Global Economic Overview: Movers, Shakers & Strugglers: Who Will Lead the World Tomorrow? | Simon Baptist, Chief Economist, The Economist Intelligence Unit |
| 09:10 | 09:30 | The Mn Industry: An Overview (Ore Overcapacity, etc.) | Aloys d'Hambure, IMnI Market Research Manager |
| 09:30 | 09:55 | The Role of China's Domestic Mn Ore Supply | Zhou Jian, Chairman of IMnI's Statistics Committee (Vale) |
| 09:55 | 10:20 | Use of Imported Mn Ore in China's EMM Production: Pros & Cons and Influences on EMM Costs | Tan Zhuzhong, President, National Friendship Association of Electrolytic Manganese Metal Factories |
| 10:20 | 10:35 | Session wrap-up: Cheng Bin, Chairman, Shanghai Jinneng International Trade Co., Ltd. | |
| 10:35 | 10:50 | Tea Break | |
| Session 4: | | | |
| 10:50 | 11:25 | South32: Making a Difference from the Ground Up | Simon Collins, Head of Business Development, South32 |
| 11:25 | 12:40 | Panel Discussion: How Will the New Mn Cycle Play Out? (effects of exchange rates on cost curves, energy constraints, environmental regulations, indexes, development of Exchanges...) | Participants: Simon Collins, Head of Business Development, South32; Arnaud Tissidre, Vice President Marketing Mn Division, Eramet-Comilog; Alastair Stalker, Managing Director, Ore & Metal; Teruaki Ishiyama, Director & Senior Adviser, Nippon Denko; Cheng Bin, General Manager, Senior Engineer, Shanghai Jinneng International Trade Co., Ltd.; Bob Qiu, Chief Marketing Executive, Tianjin Hoperay Minerals Co. Ltd.; Serafino Capoferri, Editor, Mn Ore Cost Curve Service CRU |
| 12:40 | 12:55 | LIVE POLL | |
| 12:55 | 13:00 | Session wrap-up: Arnaud Tissidre, IMnI Chairman (Vice President Marketing Mn Division, Eramet) | |
| 13:00 | 13:10 | Conference Wrap-up by IMnI Chairman | Arnaud Tissidre |
| 13:10 | 14:30 | Lunch at "Tables" Co-sponsored by Transalloys and United Manganese of Kalahari (UMK) | |