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Table of Contents

Message from the Chairman .........................................................2
Message from the Secretary General .............................................3
The Mn Industry in 2011 ..............................................................4
IMni in 2011 ..................................................................................6
Mn Ore & Alloy Market Overview ................................................8
A Decade of Achievements: OHES .............................................12
OHES Division .............................................................................14
Electrolytic Products Division ......................................................16
Marketing and Communications ..................................................18
Annual Meetings .........................................................................20
IMni Committees .........................................................................22
IMni Members and Officers .........................................................24
Unpredictable, volatile and challenging – but certainly not boring

Those of you who have been in the manganese industry long enough know that it has good years and bad years, but it never has boring years. 2011 was unpredictable, volatile and challenging but it certainly was not boring. This was also true of global geopolitical and economic developments, which directly or indirectly influenced our industry.

None of us would have been able to predict the devastating impact of the tsunami in Japan or the unbelievable events of the Arab Spring unfolding before our eyes in Tunisia, Egypt, Libya and Syria. Global economic and financial developments were perhaps more predictable but equally tumultuous - China became the world’s second largest economy, the threat of Greek default sent global financial markets into a tailspin, the USA’s credit rating was downgraded alongside those of most major European economies, while the Eurozone’s future still hangs in the balance and the general fear of the world slipping into a 1930’s style recession persists.

For manganese, the key driver remained China and to a lesser extent India. Continued Chinese growth manifested itself in another record year of steel production coupled with record imports of seaborne manganese ores. While the demand side of our industry has continued to produce records, driven mainly by China, the supply side has more than adequately responded keeping prices relatively constant at near-historical lows, eventually dipping even lower towards the end of the year. The strong currencies of major ore producing countries, namely Australia and South Africa, have put further pressure on production costs and producer margins while alloy producing countries continue to face increasing power costs. Producer and port stockpiles of manganese ore have continued to weigh on the market and play a major role in the behaviour of both buyers and sellers seeking market equilibrium.

Looking ahead to 2012, I remain optimistic and excited. While a recession in Europe appears likely in 2012, I am confident in the eventual resolution of the European financial crisis, the sustainability of the Euro, the easing of monetary policy in both the East and the West, the continued growth of China and India, and look, with interest, at the emergence of a manganese ore price index and its industry implications.

The underlying fundamental long term structure of the manganese industry remains solid and will it continue to undergo transformational changes both on the supply and demand sides in the coming years, it will remain the ‘essential element’ behind the world’s steel industry driving global industrial development and growth.

If 2011 was a challenging year for the manganese industry it was equally so for the International Manganese Institute. To fund the ambitious new OHES 5-Year Plan (2011-2015), the Board had opted to raise membership dues. This came at a particularly unwelcome time, given the tough market conditions that persisted throughout the year. Nevertheless, the vast majority of our members rose to the challenge and supported the fee rise, thus demonstrating their on-going commitment to social responsibility and sustainability. As a result, the IMnI team was able to undertake and successfully complete the projects mapped out for Year 1 of the Plan.

If the OHES 5-Year Plan continued to dominate the Institute’s agenda, it should not be allowed to overshadow other significant milestones:

• The arrival of nine new members, confirming IMnI’s reputation as the dominant meeting place for manganese industry players, as well as their most significant partner;
• An exceptionally well attended Annual Conference in Cancun and we all look forward to hearing them.
• IMnI’s new monthly statistics report, along with an upgraded data submission service, go live on the web site;
• IMnI holds its 2nd Safety Workshop, hosted by Eramet at its Kvinesdal plant in Norway.

In another noteworthy development, IMnI’s Board commissioned former Chairman John Raubenheimer to review the functioning and effectiveness of the Board, Executive Committee, Committees and Management structure of the IMnI and, if required, propose recommended improvements for the Board to consider. This is an exciting project, designed to ensure IMnI’s optimal functioning, encourage increased member participation and allow for more effective management. John will present his recommendations at the 2012 Annual Conference in Cancun and we all look forward to hearing them.

If Chairman Peter Toth can say there’s no such thing as a boring year in manganese, I can add that there are never any boring moments (or years) at the Manganese Institute! This is what makes my job exciting and one I continue to enjoy doing thanks to the unfailing support of the Board, the encouragement of our members and the help of our talented and dedicated team.

Anne Tremblay
Secretary General of the IMnI
Manganese in 2011

JANUARY - MARCH

• OMH announces it will build sinter and alloy plant in Malaysia, secures power deal.
• MOIL invites proposals for manganese JVs, plans to double production by 2020.
• Australia’s Jupiter Mines gets approval for Tshipi Borwa manganese mine in South Africa, raises A$150 million to develop it.
• Mn ore offers for March fall for the first time since Nov. 2010, as high port stocks weigh on market.
• Chinese Mn flake price hits 29-month high and then begins to fall back.
• Chuo Denki restarts SiMn, FeMn plant after temporarily halting operations in the aftermath of a massive earthquake and tsunami.
• Record manganese ore shipments from Port Hedland.

APRIL - JUNE

• Abhijeet Group plans India’s largest Mn alloy plant (181K mtpy) and Maharashtra Elektrosmelt Ltd (MEL) becomes a subsidiary of Steel Authority of India Limited (SAIL).
• Mexico Mn producer Minera Autlán boosts reserves by acquiring the Xilitla Mn concession in eastern Mexico’s Hidalgo state.
• Asia Minerals Limited (AML) is targeting investment of $70 mln in a mining project in Zambia after buying TAZARA’s Lusiwasi station. It plans to produce 250K mtpy by 2013 and 400K mtpy by 2015.
• Jindi Mining to build largest Mn-rich slag (MRS) line in China with capacity of 336K mtpy of MRS and 56K mtpy of FeMn.
• Glencore goes public with a $10 billion initial public offering on the London Stock Exchange.
• Nikopol shuts production for 3 weeks and output at Zaporozhye cut to 50%.
• BHP Billiton planning new manganese mine in Gabon.

JULY - SEPTEMBER

• The World Trade Organization (WTO) ruled that China was illegally restricting exports of nine key raw materials, including EMM; China to appeal ruling.
• South African producer Assmang will convert its Machadodorp ferrochrome works’ No 2 and No 3 furnaces to produce HC FeMn, which would bring its total capacity to 375K mtpy, up 100K mtpy.
• Transnet CEO Siyabonga Gama favours South Africa’s new deep-water harbor, Ngqura, as the logical choice for any large-scale expansion of Mn exports, construction to start in 2012.
• China plans to eliminate over 2 million mtpy ferroalloys capacity by the end of the year.
• Smuggling of Chinese EMM through Vietnam is distorting global prices and hurting legal exporters.
• BHP Billiton to increase Mn ore capacity at Gemco from 4.2 mln mtpy to 4.8 mln mtpy by 2014.

OCTOBER - DECEMBER

• MOIL enters Fortune 500 Companies List, leaves ore prices for 4Q 2011 unchanged.
• Eramet will produce SiMn 60K mtpy and EMM 20k mtpy in Gabon starting in 2013; the operations should be the lowest cost SiMn producer in the world.
• ArcelorMittal shut blast furnaces in France, Germany and Poland and electric arc furnaces in Spain and Luxembourg. European Metalworkers’ Federation (EMF) staged 24-hour strikes in protest.
• Construction of a 30K mtpy EMM project kicked off in Ankang city in Shaanxi province by Shunfu Mining; EMM production to begin by 2013.
• Nizi reorganises its ferroalloys team after trader resignations; Stemcor pulls out of ferroalloys trading and Robby Afnaim sells stake in Ronly and exits company he co-founded.
• China set to increase electricity charges up to RMB 0.03/kWh.
• Eramet plans to idle furnace in Norway on poor market, but boost ore output.
**IMnI in 2011:**

**JANUARY - MARCH**
- MOIL hosts IMnI Board and Committee meetings in Nagpur.
- After Mumbai in 2009 and Raipur in 2010, IMnI holds its third meeting with its Indian members on February 17 in Nagpur.
- Secretary General Anne Tremblay chairs the Mn panel at Metal Bulletin's 12th Asian Ferroalloys Conference in Hong Kong. Speakers include IMnI's Chairman Peter Toth (OM Holdings), Market Analyst Mark Camaj and Regulatory Affairs Manager Dr. Keven Harlow.
- Following the successful registration of ten substance dossiers in 2010, the REACH Consortium Secretariat begins to develop the technical information for the two remaining substances (MnS and MnCl2), which will be registered before the 2013 REACH deadline.
- Transnet, Reunion Manganese Ltd, Shaw River Manganese and Jupiter Mines Limited take out membership.

**APRIL - JUNE**
- IMnI hosts its 8th EPD Conference in Kunming, China on Friday, April 1, with three Chinese industry organizations.
- IMnI holds its Annual China Banquet Dinner during Metal Bulletin's 12th Asian Ferroalloys Conference in Hong Kong on March 28.
- Eramet hosts the Institute's 2nd Safety Workshop at its Kvinesdal plant in Norway in early May.
- The 37th Annual Conference takes place on Jeju Island, South Korea, May 24 to 26. Sponsors are Simpac Metalloy, POS-HIMETAL, Dongbu Metal and BHP Billiton.
- Three new members come on board: Shanghai Jintong Manganese Co, Buchans Minerals Corp. and On Faith Development Limited.

**JULY - SEPTEMBER**
- A new Regulatory Committee is created in response to the surge of comprehensive and demanding regulations that will continue to impact the manganese industry worldwide. An arm of the OHES Committee and co-ordinated by Regulatory Affairs Manager Keven Harlow, the committee holds its 1st meeting in Paris and elects Assore's Cathy Reichardt as Chair.
- First edition of IMnI's new electronic newsletter Worldwide Regulations Affecting Manganese is released.
- IMnI participates in the Indian Ferroalloy Producers Association (IFAPA) Conference in Goa. Secretary General Anne Tremblay presents IMnI's Occupational, Health and Safety (OHES) 5-Yr Plan and India Representative Shweta Dharia gives an overview paper *Global Manganese 2011*.
- Montezuma Mining Company Ltd. takes out membership.

**OCTOBER - DECEMBER**
- IMnI Chairs the Mn session at Metal Bulletin’s 27th International Ferroalloy Conference, in Berlin.
- IMnI takes out membership with the International Council on Mining and Metals (ICMM).
- A reference list highlighting the contents of IMnI's Electronic Library, which contains scientific publications on health, safety, environment and sustainability related to manganese, is posted on the Institute’s website: www.manganese.org.
- Elkem takes out membership, the 9th company to do so in 2011.
- The REACH Consortium’s Technical Working Group holds its annual meeting at Ferroatlantica's headquarters in Madrid.
- IMnI presents a summary of its OHES 5-Year plan at the Japan Ferroalloy Association’s Executive meeting in Tokyo.
IMnI provides the most comprehensive manganese industry market research available.

Now available on a monthly basis, IMnI’s reports examine both production and consumption, and the balance between the two, looking at the industry from both sides of the supply demand equation. The primary objective of these reports is to offer an analysis of the immediate past, which can provide the basis for members to develop a greater understanding of their business. Our market analyst, Mark Camaj examines manganese ore and alloy consumption as they relate to the steel industry with the application of an industry model. This approach provides increased accuracy and a systematic approach to better understand and anticipate changes in the industry. All IMnI data is available via our online database. To compliment these reports IMnI issues monthly trade matrices for Mn ore, Mn ferroalloys, EMM and EMD and a steel production report.

STEEL – New record high of over 1.5 billion mt. Global production of crude steel continued to improve in 2011, rising 6.8% from the 1.42 bln mt produced in 2010 to 1.51 billion (bln) mt. China continued to be the largest producer by far, accounting for 45% of total output, with output of 683 million (mln) mt. This marks growth of 8.9% year-on-year (y-o-y), down from 9.4% the year before. Output in Asia (excluding China) was 293 mln mt, a rise of 5.6% y-o-y. The European Union 27 produced 177 mln mt, a rise of 3% y-o-y and North America 119 mln mt, a rise of 6.8% y-o-y. Although output for the year was at record levels, a slowdown at year’s end was clearly in effect. Output from Jan-Oct was up 8.4% y-o-y, but output in Nov-Dec was up just 1.4% y-o-y. This meant that the upstream Mn ore and ferroalloy markets were heading into the New Year with much uncertainty regarding what 2012 held in store for Mn demand.

MANGANESE ALLOYS – Production was up but increased competition limited performance. Manganese ferroalloy output continued to increase in 2011 to a new record high of nearly 16 mln mt. This was a 7% rise y-o-y, on par with the growth in the crude steel sector. SiMn production accounted for 62% of total ferroalloy production (9.8 mln mt), HC FeMn accounted for 28% (4.5 mln mt) and Ref FeMn accounted for the remaining 10% (1.6 mln mt). Although ferroalloy output was at all times highs, uncertainty regarding the sustainability of global GDP growth as well as strong competition between domestic ferroalloy producers and importers kept the performance of ferroalloys subdued throughout the year. Global unit consumption of manganese ferroalloys continued to vary significantly from region to region due to different steel production processes, the quality of the raw materials used (such as iron ore grades) and types of steel products produced. The global average continued to be around 10 kg Mn ferroalloys per mt of steel produced in 2011.

MANGANESE ORE – Record output but uncertainty in market. Much like the steel and Mn ferroalloy markets, Mn ore production was up in 2011. Production of Mn ore in terms of Mn units contained rose 9% to 15.8 mln mt. This amounted to 48 mln mt of Mn ore in gross mt (or an average grade of 32.8%). Throughout most of the year ore prices remained stable, even amidst talk of excessively high port stocks in China. Finally in December a reduction in offer prices was announced for January 2012 delivery due to the uncertain outlook for China steel production, which fell during the last few months of 2011. Still it is important to note that China imported a record high 13 mln mt of seaborne ore in 2011, an average of 1.1 mln mt per month. Demand outside of China was also firm as Mn units were needed to support growing ferroalloy production during the year.
**Figure 1. Steel Production (million mt)**

- Rest of World
- China

**Figure 2. Global Mn Alloy Production**

- HC FeMn
- Ref FeMn
- Si Mn

**Figure 3. Global Mn Ore Production (million mt)**

- Mn Ore (Wet)
- Mn Ore (Content)

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**IMI offers the most comprehensive manganese statistics available**

**IMI provides you with monthly reports for**

- **STEEL PRODUCTION**
  track output country-by-country

- **Mn TRADE FLOWS**
  track the global exchange between the top 20 importers and exporters

- **Mn PRODUCTION AND CONSUMPTION**
  track supply and demand

For individual queries concerning submission and use of IMI statistical services, contact Market Analyst Mark Camaj at stats@manganese.org

**Strategically analyze the markets that concern you most with our customizable database.**
## A Decade of OHES Achievements

*The Mn industry matures through pro-active OHES responsibility, culminating in the initiation of an ambitious OHES 5-Year Plan.*

### IMnI ACTIONS

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<tr>
<td>US Congress votes $1.3M for Phase I of Mn Health Research Program (MHRP)</td>
<td>Leif Andreassen (Tinfos) steps down as OHES Chair. Catherine Tissot-Colls (Eramet) replaces him</td>
<td>Phase 1 MHRP funds released &amp; studies begin</td>
<td>Scientific Criteria Document for Mn commissioned by IMnI from IOM &amp; IEH is published</td>
<td>Parametrix (USA) selected to prepare Mn Ecotoxicological Criteria Document</td>
<td>IMnI mandates IOM (Scotland) to perform the Mn REACH Health Assessment study</td>
<td>Phase 3 of MHRP launched with new $1.4M grant from US Congress</td>
<td>IOM (Scotland) wins tender to develop a harmonised method of measuring Mn exposure in workplace</td>
<td>Hatch (Toronto) is appointed to help IMnI develop a Strategy for Mn Sustainability</td>
<td>IMnI Board workshop conducted by Hatch examines sustainability issues</td>
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<td>Kinghorn &amp; Ass. retained as US lobbyist to seek funding for Mn Health Research Program (MHRP)</td>
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<td>IMnI's first safety workshop hosted by BHPB at its TEMCO site</td>
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### EXTERNAL EVENTS

- EU adopts White Paper outlining REACH system
- UN publishes 1st edition of "Globally Harmonized System of Classification and Labelling of Chemicals (GHS)"
- Class action law suits involving Mn in welding fume spread across USA
- REACH enters into force
- REACH Pre-Registration opens for phase-in substances above 1000T/Y
- REACH Pre-Registration closes
- Health Canada & US Environmental Protection Agency (EPA) publish new Risk Assessments for Mn and a few other US Depts. come out with stricter regulations for Mn
- REACH Registration deadline for +1000tpa ends
- Global Harmonization System (GHS), a UN-driven scheme for classification & labelling, goes into force
- China REACH enters into force
- South Korea drafts new chemical law, similar to REACH
- USA ACGIH issues reduced exposure limit for respirable Mn

### OHES 5-Year Plan

- goes into effect
- OHES new Regulatory Committee holds first meeting
- Results of IMnI/UK Environmental Agency research published in scientific journal
- Work begins on REACH registration of 2 additional Mn substances
- First Regulatory Bulletin issued to IMnI members
- Eramet Norway hosts 2nd safety workshop
- South Korea drafts new chemical law, similar to REACH
- USA ACGIH issues reduced exposure limit for respirable Mn
Its mission is to develop the IMnI as the platform for providing the Mn industry with guidance, tools and information that will allow it to anticipate occupational health, environment and safety demands whilst improving worker safety, sustainability and ensuring industry profitability. To support this mission, the committee answers three main objectives:

- To identify those OHES topics that can impact on the Mn industry.
- To establish and employ a global network that can provide appropriate OHES expertise to IMnI, when necessary.
- To provide relevant information and support to members so as to enable them to promote and proactively ensure their interests when faced with new regulatory demands.

2011 saw the first steps towards achieving the goals outlined in the OHES 5-Year Plan (2011-2015). The plan, comprising 5 goals, aimed to resolve many of the outstanding health & environmental issues facing the Mn industry. Progress achieved per goal in 2011 is detailed below:

Goal 1: Anticipate & track major regulations spreading worldwide
In response to worldwide regulatory demands, the OHES committee developed a sub-committee: the Regulatory Committee. Made up of representatives from every continent and coordinated by IMnI’s Dr. Keven Harlow, the committee has a triple mandate: anticipate and track major regulations globally, understand their impact on the Mn industry and support IMnI members with compliance.

Goal 2: Develop economically sound industry safety standards
The quest to identify appropriate industry safety standards focused on finding a reliable biomarker and a globally acceptable occupational exposure limit for the Mn industry. Risk Sciences International (Canada) and the University of Cranfield (UK) were chosen to tackle these initiatives head-on. Both institutions made excellent progress reviewing the available scientific literature. Next step: fill the data gaps.

Goal 3: Study & limit occupational health effects
Research that best answers the Mn industry’s needs was designed by a Scientific Advisory Board. This expert group of independent scientists (led by Prof. Len Levy), developed a program of studies focusing on the effects of Mn exposure. With this in hand, the IMnI contracted Washington, D.C. lobbyist Kinghorn, Hilbert & Associates to seek US government funding. News appears promising.

Goal 4: Quantify and evaluate environmental life cycle & risk
Measuring the environmental performance of the global manganese alloy industry, as well as highlighting the potential risks to the environment (if any) caused by the Mn industry’s activities is our responsibility. IMnI recruited Hatch, the Toronto-based consulting firm, to develop a cradle-to-gate Life Cycle Assessment (LCA). Solid progress has been made in Year 1.

Goal 5: Knowledge-sharing and best practices – Continuous Improvement
As part of the ongoing knowledge-sharing and best practices initiative, IMnI’s 2nd safety workshop, hosted by Eramet at their plant in Kvinesdal, Norway, was a resounding success. Attracting over 20 delegates representing 9 countries, participants gained new and invaluable knowledge regarding liquid metal, its characteristics and the hazards it poses from a safety and engineering standpoint.
The IMnI Electrolytic Mn Products Division (EPD)

Going from Strength to Strength with China Partners

Electrolytic Mn Metal (EMM) production continues to be almost exclusively centralized in China, which accounts for over 95% of total world production. It produced an estimated 1 million mt of the metal in 2011. Much of this output is used within the country to produce the Stainless Steel 200 series (SS200). Most, if not all, of the nickel traditionally used in the production of stainless steel is replaced with EMM in this type of stainless steel. SS200 is a cheaper alternative of stainless steel used in a wide array of applications in China and India and is gaining acceptance in other parts of the world. China also exported 162K mt of EMM in 2011. Other applications for which EMM is a vital ingredient include aluminium, along with specialty and high strength steels.

Electrolytic Mn Dioxide (EMD) is a vital ingredient in the production of alkaline batteries, an essential part of our daily lives. The EMD industry is smaller than that of Mn alloys and EMM but no less important. IMnI EMD members are present throughout the world supplying major battery companies like Energizer and Duracell. Members include Citic Dameng in China, Delta EMD in South Africa, Erachem Comilog in the USA and Belgium, Quintal in Columbia, and Tosoh in Greece and Japan. IMnI represents a forum where EMD members can work to strengthen the industry and ensure a sustainable future marketplace.

The Electrolytic Products Division (EPD) hosted its 8th EPD China Conference in Kunming on April 1, 2011 with its 3 China partners. It was the largest global EPD conference of the year with over 200 delegates in attendance, once again proving to be the premier global EPD event. The program was filled with first rate international and domestic speakers who covered the market dynamics and trends of these two industries. Delegates were very active and the forum which followed the conference was lively and tackled the major issues within the industry.

Major topics covered included:
- Plans for structural reforms and their impact on EMM and EMD
- The future effects of emission reductions for EMM and EMD
- Mn ore supply in China and exploration of overseas resources
- Market trends and forecasts for EMM, EMD and Stainless Steel 200 Series
- Lithium battery industry and new applications for Mn materials

Our 9th EPD China Conference will be held on March 31, 2012 in Nanning. For information about IMnI conferences, contact us at: events@manganese.org
MARKETING & COMMUNICATIONS COMMITTEE POLICY

Improves communications between members.
Creates tools to attract new members.
Promotes increased awareness of new developments in the use of Mn.
Enhances the public image of Mn.

The M&C Committee is responsible for:
• The Annual Conference, along with other seminars and events.
• Publications, such as the twice-monthly Mn Matters newsletter and the Annual Review.
• The website.
• The membership drive.
• Establishing links with universities or research institutes working on new or improved ways to use Mn.
• Working in tandem with the M&C China Sub-Committee and the M&C India Sub-Committee to ensure better liaison with IMnI’s Chinese and Indian members and increase membership in both these countries.

IMnI’s Marketing & Communications
Consolidating its relationship with members

Throughout 2011, the Institute made substantial progress in consolidating its relationship with members, while raising its profile around the world.

The IMnI hosted a number of events in China, India and Europe. The Electrolytic Products Division (EPD) held its 8th EPD China Conference in Kunming on April 1st. Attracting over 200 delegates, this has become the largest single event produced by the IMnI, even outstripping in numbers the Annual Conference. The EPD conference has also confirmed its place as the year’s major international meeting for Electrolytic Manganese Products. The one day conference was produced with IMnI’s 3 major Chinese partners: the National Friendship Association of Electrolytic Manganese Metal, the National Manganese Industry Technology Committee and the National Friendship Association of Electrolytic Manganese Dioxide.

A few days earlier, IMnI had hosted its 6th China Ore and Alloy Banquet -- an informal get-together between Chinese and Western producers -- during the Metal Bulletin Ferroalloy Conference, in Hong Kong.

Indian member MOIL Limited hosted the February Board meeting at their Nagpur head-quarters and provided the occasion for Board members and staff to hold IMnI’s third workshop with its Indian members. Secretary General Anne Tremblay was back in India in September, when she was invited to speak at IFAPA’s Annual Conference in Goa. The Institute’s India Representative Shweta Dharia also presented at this event.

In addition to these member-directed initiatives, IMnI continued to be in demand at industry conferences. Chairman Peter Toth, member Jaco Venter from Assmang, Market Analyst Mark Camaj were guest speakers at Metal Bulletin’s Ferroalloy Hong Kong Conference in the Mn panel, chaired by IMnI’s Secretary General. The invitation was renewed by Metal Bulletin for its International Ferroalloy Conference in Berlin in November, where speakers included Zhang Zhigang of Minmetals, A.K. Mehta of MOIL and IMnI’s Reach Consortium Manager Dr. Kevan Harlow.

IMnI’s Annual Conference has emerged as the Mn ore and Mn ferroalloy industries’ premier event. The 2011 edition on Jeju Island -- the first year it took place in South Korea -- once again confirmed its reputation. Attendance was 160, making it one of the most well-attended to date. The Conference theme – “Manganese – Future Strength” – generated lively debate.

Membership continued to grow with 9 more companies joining our ranks. Three came from Australia and one each from Canada, Hong Kong, the People’s Republic of China, Norway, South Africa and the United States (names of new members appear on pages 6-7.) For manganese players, the International Manganese Institute (IMnI) continues to be the industry’s most effective and reliable partner.
IMnI's 38th Annual Conference

Tuesday, June 12 - Thursday, June 14

The Ritz-Carlton, Cancún, Mexico

Theme: "The New Age of the Manganese World: Lessons from the Mayan Culture"

For information contact:
events@manganese.org
Tel: +33 (0) 1 45 63 06 34
Fax: +33 (0) 1 42 89 42 92

IMnI's 37th Annual Conference

May 24-26 2011
Shilla Hotel
Jeju Island
South Korea
The life of the Institute is regulated by the work done by its committees. There are three standing committees: Occupational Health, Environment and Safety (OHES), Statistics, and Marketing and Communications (M&C). They meet on average between three and four times a year, and are open to both Ordinary and Affiliate members. Each committee is chaired by a member, while the secretariat is handled by a permanent IMnI staffer. Each also has about a dozen members.

In addition to these standing committees, there are three sub-committees: Regulatory Affairs (an arm of the OHES Committee), along with the China and India Marketing & Communications Sub-Committees.

The Electrolytic Products Division (EPD) operates like a committee and is formed of producers of electrolytic manganese metal and electrolytic manganese dioxide.

Committees are the lifeblood of the IMnI, providing vision, ideas and direction to nourish its fundamental missions.

### IMnI Committees 2011

#### IMnI’s Executive Committee

IMnI’s Executive Committee is a small, active body formed by the Chairman, two Vice-Chairmen and the Secretary General. Their role is to prepare Board meetings, ensure that resolutions made there are carried out and make decisions that do not require Board approval. The two current Vice-Chairmen are Paul Doetsch (Vice President Marketing – Manganese, BHP Billiton) and James Jin Shik Choi (Chairman & CEO, Simpac ANC).

#### Statistics Committee

- Branislav Klocok (Chairman)
- Jay Cho
- Simon Sullivan
- Ben Cohen
- Xavier Revest
- Antonio Salinas
- Toshiaki Abe
- Georg Dreiskaemper
- Juan Bosco Alvarez
- A.K. Mehra
- Colin Ouwehand
- Denny Sabah
- Mark Camaj
- Anne Tremblay
- Vale
- Asia Minerals Ltd.
- BHP Billiton
- Consolidated Minerals
- Eramet Comilog Manganese
- Ferroatlantica, S.A.
- Japan Ferroalloy Association
- L&M Group
- Minera Autlan, S.A.B. de C.V.
- MOIL Limited
- OM Holdings Ltd.
- Ronly Holdings Ltd.
- IMnI
- IMnI

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- Eramet
- Afton Chemical
- BHP Billiton
- Eramet Ferroatlantica, S.A.
- Manganese Metal Company
- Manganese Ore (India) Ltd.
- Ore & Metal Company
- Vale Manganese France
- IMnI
- IMnI

#### Marketing & Communications Committee

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- Simpac Metalloy, Co. Ltd.
- IMnI
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- Pietro Amico (Vice-Chairman)
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- Li Tongqiong
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- Erachem
- Baja Mining Corp.
- CITIC Dameng Mining Industries Ltd.
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- Tosoh Corporation
- IMnI
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Jinxu Metallurgical and Chemical Co. Ltd., China
Manganese Metal Company (MMC), South Africa
Quintal S.A., Colombia
Tosoh Corporation, Japan
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Develops and promotes universal best practices for a sustainable manganese industry.

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