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.

Occupational Health, Environment & Safety

Develops and promotes universal best practices for a sustainable manganese industry.

Events & Conferences

Organizes worldwide industry gatherings, including the biggest global manganese event for networking and learning.

stats@manganese.org
ohes@manganese.org
events@manganese.org
IMnI Members

ORDINARY MEMBERS

Asia Minerals Ltd., China (Hong Kong)
BHP Billiton, Australia
ChinaLight Resources Imp. & Exp. Corp., China
Chuo Denki Kogyo Co. Ltd., Japan
Compañía Minera Autlán, S.A.B. de C.V., Mexico
Consolidated Minerals Ltd., Jersey
Eramet Comilog Manganese, France
FerroAtlantica, S.A., Spain
Glencore International AG, Switzerland
JSC Zhayremski GOK, Kazakhstan
Mathan Alloys Limited, India
Minmetals Development Co. Ltd., China
Mitsubishi Ferroalloy Co. Ltd., Japan
Mogale Alloys (Pty) Ltd., South Africa
MOIL Limited, India
Nippon Denko Co. Ltd., Japan
OFZ, a.s., Slovak Republic
OM Holdings Ltd., Singapore
Ore & Metal Co. Ltd., South Africa
Rohit Ferro Tech Limited, India
Simpac Metallloy Co. Ltd., South Korea
S.K. Sarawagi and Co. Pvt. Ltd., India
Skopski Leguri Dooel, Macedonia
Tata Steel Limited, India
Transalloys Pty Ltd., South Africa
Tshipi é Ntle Manganese Mining (Pty) Limited, Australia
Ukrainian Ferroalloys and other Electrometallurgy Products Manufacturers (UkrFA), Ukraine
United Manganese of Kalahari (Pty) Ltd., South Africa
Vale, Brazil

AFFILIATE MEMBERS

Afton Chemical Corp., U.S.A.
ACMI-DCM Resources GmbH, Austria
ArcelorMittal, Luxembourg
Cahya Mata Sarawak Berhad, Malaysia
Canadian Manganese Company, Canada
Canus Corporation, U.S.A.
Centre de Recherches Métallurgiques (CRM), Belgium
CREC Materials Co. Ltd., China
Eklem as., Norway
FESIL Sales S.A., Luxembourg
Guangxi Xin-Manganese International Trading, China
Hanwa Co., Ltd., Japan
Italiana Prodotti Minerali S.R.L. (I.P.M.), Italy
JFE Shoji Trade Corporation, Japan
Kalagadi Manganese Pty Ltd., South Africa
L&H Group, Switzerland
Lusta Commodities, Switzerland
Luxembourg Metallurgical Trade (L.M.T.) S.A., Luxembourg
Marubeni Tetsugen Co. Ltd., Japan
Metmar Limited., South Africa
Mineração Buritirama S.A., Brazil
Minerais US LLC, U.S.A.
Mitsui & Co. UK Ltd., Japan
Montezuma Mining Company Ltd., Australia
Noble Resources Ltd., Singapore
Omi Industries BV, Netherlands
Prince Minerals, Inc., U.S.A.
Reunion Gold Corp., Canada
Rondy Ltd., United Kingdom
SAC Co., Ltd., South Korea
S.H. Bell Company, U.S.A.
Shanghai Jeneng Resources, China
Shaw River Manganese Ltd., Australia
Sibelco Europe MineralsPlus, Netherlands
Sumitomo Corporation, Japan
Tianjin Hoperay Mineral Co. Ltd, China
Tokyo Boeki Steel & Materials Ltd., Japan
Traxys Europe, France

ELECTROLYTIC PRODUCTS DIVISION (EPD)

CITIC Dameng Mining Industries Ltd., China
Delta EMD (Pty) Ltd, South Africa
Erachem Comilog Inc., U.S.A.
Manganese Metal Company (MMC), South Africa
Ningxia Tianyuan Manganese Industry Co., Ltd., China
Quintal S.A., Colombia
Tosoh Corporation, Japan
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The manganese industry - like many other mining industries - is confronted by severe challenges.

First, several new large mines have emerged in South Africa and are now in operation. The expansion of existing mines and the opening of other smaller new mines have created a substantial mining overcapacity. The oversupply of ore will most certainly feed the existing large overcapacity in alloy production world-wide.

The slow-down of economic growth in China, particularly in the construction sector, resulted in 2014 in a minimal increase of Chinese steel production. It is too early to know if the drastic drop in steel production growth in 2014 in China signals the beginning of a new cycle for steel or is driven by short term issues, or a combination of the two. Nevertheless it seems quite likely that the manganese industry will have to adapt to lower demand growth in the future.

Slower demand and supply overcapacity have already resulted in low prices for manganese ore and alloys.

The focus of the manganese industry is now, even more than ever, to be competitive over the long term.

Despite these less favourable times, the manganese industry has to cope with ever increasing demands: regulatory and administrative constraints, growing expectations from stakeholders to reduce its environmental footprint...

Over the last few years, the International Manganese Institute has developed the scientific knowledge and know-how to address all these key issues. Being part of the IMnI, guarantees manganese producers access - at a reasonable cost - to the information required increasingly by authorities, communities, regulators.

Arnaud Tissiédré
Chairman of the IMnI

If 2014 was especially challenging for the Mn industry, it was equally so for the Institute. But despite these difficult times, the IMnI did chalk up some impressive successes. These included:

• An “historic” conference in Cape Town - unprecedented attendance, along with an exceptional line-up of speakers and a strong technical tour offer,
• Improving our presence in China and our services to members there,
• Developing a series of “… for Dummies” seminars to educate members on regulatory and OHES issues and tools IMnI can offer to address them,
• Conducting a poll of Supervisory Board members to better understand their expectations and priorities.

The Supervisory Board poll was encouraging with a strong take-home message, saying: “Keep doing what you’re doing and do MORE.” Market Research and Statistics, OHES and the Annual Conference all received kudos. This said, there is room for improvement, notably regarding maintaining membership (this applies especially in India and China), packaging our “value proposition” to be attractive to members and encouraging more active member involvement. It was generally agreed that IMnI’s communications today require a major effort.

The poll also revealed that new needs are emerging. OHES & Regulatory Issues are now members’ primary focus and they are asking the IMnI for concrete help and tools to tackle these areas. Not surprisingly, given the state of the market, members are also requesting the IMnI to monitor and report major developments and new applications for Mn that could affect the industry.

Our road map for 2015 is clear. Improving communication tops the list. But we will also ensure that the OHES 5-Year Plan is successfully concluded and the next plan approved and running. Pro-actively engaging with regulators to better protect the industry is also a priority. The IMnI team is ready to tackle these challenges, while also maintaining and enhancing the quality of our market research and of our Annual Conference.

Anne Tremblay
Executive Director of the IMnI

Message from the Executive Director:

“The Supervisory Board poll revealed that new needs are emerging.”

Message from the Chairman:

“… it seems likely that the manganese industry will have to adapt to lower demand growth...”
IMnI in 2014:

**JANUARY - MARCH**

- Sophie Liu replaces Yinong Shen as IMnI’s China Representative.
- IMnI hosts its 11th EPD (Electrolytic Products Division) Conference in Guiyang, China, on Saturday, March 29, with the support of CITIC Dameng’s CEO Li Weijian, the head of IMnI’s EPD Division. The event attracts over 140 delegates.
- IMnI holds its Annual China Banquet Dinner in Hong Kong on March 31. Some 65 members and potential members attend. Hosts are: Asia Minerals, BHP Billiton, Consolidated Minerals, Eramet Comilog Manganese, FerroAtlantica, Glencore, Minera Autlan, Mineracao Buritirama, OM Holdings, Ore & Metal Company, S.K. Sarawagi, United Manganese of Kalahari (UMK) and Vale.
- IMnI launches its new high-speed, state-of-the-art website.
- IMnI again takes part in Metal Bulletin’s Asian Ferro-Alloy Conference in Hong Kong, April 1-3. Mn panel speakers include IMnI Chairman Arnaud Tissidre, Vice President Commercial, Ore & Alloys, Eramet, IMnI Vice-Chair Pedro Larrea, Chairman and CEO, Grupo FerroAtlântica and Board Member Johan Kriek, CEO, UMK.
- Three new members join the Institute: Tianjin Hoperay Mineral, Guangxi Xin-Manganese and JFE Shoji Trade Corporation.

**APRIL - JUNE**

- IMnI’s 5th Annual OHES Workshop in Carajás, Brazil focuses on Traffic Control Strategies to Ensure Safety in Mines. Sponsored by Vale Manganese SA, the workshop gathers 27 delegates.
- The Mn industry’s cradle to gate Life Cycle Assessment (LCA) project, which started in 2011, is completed.
- IMnI holds its 40th Annual Conference, May 28-30 in Cape Town. It is an unmitigated success on all counts. United Manganese of Kalahari (UMK) sponsors the welcome cocktail, and Tshipi e Ntle and Afriminerals Trading AG along with Transalloys sponsor the lunches. Two days of technical tours showcasing the country’s new mines, ports, and state-of-the-art ferroalloy, EMM and EMD plants, attracts many participants.
- MMC’s Buks Botes replaces Erachem’s Pietro Amico as Vice-Chair of the EPD Division.

**JULY - SEPTEMBER**

- The first, socio-economic assessment (SEA) of the global manganese industry is completed. It is an excellent tool for communication, lobbying and regulatory defense.
- Consortium Manager Keven Harlow develops a “REACH-for-Dummies” teaching module and presents it at the IMnI Annual Conference. The 55 member participants are trained in the fundamentals of REACH.
- IMnI issues guidance for the new Mn ore fines schedule and participates in a publication on the hazard assessment of ores and concentrates for marine shipping.
- OHES Committee members attend an environmental risk assessment course in Slovakia.

**OCTOBER - DECEMBER**

- The Life Cycle Assessment (LCA) project, which evaluated the environmental parameters - water, energy, waste, power, etc. - from 17 different IMnI member company sites, from mining to alloying, wins the award for best poster presentation at the avniR Conference.
- At Metal Bulletin’s International Ferro-Alloy conference held in November in Barcelona, IMnI’s OHES Manager Doreen McGough and Market Research Manager Alberto Saavedra both present. The Mn Panel features IMnI Chairman Arnaud Tissidre, Vice-Chair Pedro Larrea, Supervisory Board Member Johan Kriek and Elisabe Muller, General Manager Marketing Manganese for BHP Billiton. Executive Director Anne Tremblay moderates the exchange.
- Aloys d’Harambure, formerly ICDA’s Business Analyst, replaces Alberto Saavedra as Market Research Manager.
- IMnI through the Washington-based Mn Interest Group (MIG) urges the US EPA to incorporate the latest Mn science in its review of the national emissions standard for hazardous pollutants – ferroalloy production.
Manganese in 2014

JANUARY - MARCH

• Sandur Manganese suspends mining operations in India as lease expires.
• BHP resumes Port Hedland operations as cyclone Christine passes.
• Eramet restarts HC FeMn furnace at its Sauda site in Norway.
• Mexico’s Autlán takes control of energy company.
• Asia Minerals Corporation ships first manganese cargo from Indonesia.
• Kramatorsk Metallurgical Works restarts FeMn production in Ukraine under new owner Evgeny Ivanov, the owner of Satka Metallurgical Mill (a major Russian producer of HC FeMn).
• Guizhou province completes 2013 plan to eliminate outdated manganese alloy capacity.
• South Africa’s Eskom asks industrial users to cut consumption by 10% in power emergency.
• Chinese manganese producers suspend output as prices near production costs.
• Gulf Minerals unveils plans for $36m alloy smelter facility in Indonesia.
• MOIL to start prospecting at 11 manganese ore blocks in Maharashtra.

APRIL - JUNE

• Australia-listed manganese and gold exploration company Zamanco Minerals signs deal to buy Zambia manganese ore assets.
• SiMn and HC FeMn producer Felman gets special power rate offer from state of West Virginia.
• China’s Inner Mongolia expanding SiMn capacity.
• South Africa’s Kalagadi Manganese ships first sinter to China.
• MOIL set to invest in new $100 mln ferro-alloys plant at Bhilai in the state of Chhattisgarh.
• Stakhanov Ferroalloy Plant back on line in Ukraine after power restored.
• Ukraine’s Nikopol changes production mix in favour of SiMn; Zaphorizhysye ups FeMn.
• Burkina Faso gives approval for $1 bln Pan African Minerals Tambao manganese mine.
• Manganese flake offers from China jump on torrential rain.
• Ukrainian ferroalloy producers face higher costs after Gazprom cuts off supplies.
  * Reunion Gold Corp seeks more funding for Caribbean SiMn project.
  * Ningxia Tianyuan Manganese increases electrolytic manganese capacity.

JULY - SEPTEMBER

• Gabon State mining company forms JV with Dubai-based group Navodaya Trading DMCC (NTDMCC) to explore manganese resources.
• Felman looks to restart SiMn output at end of July.
• Mn producers in Hunan, China cut production on heavy rain.
• Australian minerals explorer Zenith Minerals buys manganese plot from Rio Tinto.
• Mexico’s Minera Autlán plans expansion of hydroelectric plant.
• China’s Ningxia Province offers ferroalloys industry preferential power prices.
• Zhengzhou Commodity Exchange starts trading ferroalloys futures.
• China’s Erdos reopens SiMn furnaces.
• Pro-Russian separatists seize Privat’s Stakhanov ferro-alloys plant.
• Delta continues efforts to sell former Australian plant.
• BHP Billiton announces plans to spin-off Aluminium, Nickel, Manganese and Silver assets.
• OM Holdings advances ferro-alloys plant project in Malaysia.
• China’s Ministry of Industry and Information Technology (MIIT) approves 450,000 tpy of SiMn capacity.

OCTOBER - DECEMBER

• Sumitomo invests $500 mln in Assmang and China Steel Corporation Malaysia Mn alloys project.
• Chinese Jiaocheng Yiwang’s Mn alloys production capacity seen doubled.
• China’s Inner Mongolia to shut down SiMn smelters for APEC.
• Irregular power supply hits ferro-alloy production in Cuncolim, Goa, India.
• China’s Hunan Tycoon Manganese restarts its plant in Youyang.
• China Hongxin Group opens Mn plant in Jiayu.
• AIM-listed company Ferrex gets environmental permit for Nayega Mn project in Northern Togo.
• MOIL aims for 2mn t production capacity by 2020.
• UK steel trader Stemcor manganese mine asset in Odisha, India, attracts new buying interest.
• Ukraine’s Nikopol continues to increase SiMn output.
• BHP Billiton names its Mn, Al, Ni spin-off South32.
IMnI provides the most comprehensive manganese industry market research available.

Circulated 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 Research Manager, Aloys d’Harambure 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 way to better understand and anticipate changes in the industry. All IMnI data is available via our online database.

IMnI also issues monthly trade matrices for Mn Ore, Alloys, EMM and EMD, a steel production report, and also publishes reports on New Manganese Projects around the World and Import and Export Duties for Mn Products.

**Manganese Ore and Alloy Market Overview**

**2014: Marked by Slow Demand**

**STEEL** - China continues to lead while the rest of the world recovers slightly. Global Steel Production in 2014 showed an increase of 2.5% year-on-year (y-o-y) to 1.65 bln mt. China, which represents 49% of world steel production, showed the highest increase (9% y-o-y) with annualized figures. Other world regions continued to experience periods of low demand, although better in comparison to 2013. Europe is expected to show a slight increase of 3% in production over 2013 to 171 million tons. As for North America, it will likely show an increase of 2% over 2013, to total 122 million tons.

**MANGANESE ALLOYS** - Mn Alloy demand followed the slight increase in steel production. Producers of Mn Ferroalloys around the world are experiencing some major challenges, like high electricity tariffs in North America, lack of energy supply in Brazil and South Africa, high production costs in Europe, as well as the geopolitical situation between Ukraine and Russia, which together incite industry players to speculate on the supply side. As we go to press, IMnI estimates that 19.5 mln mt of Mn alloys were produced in 2014, up 2% y-o-y thanks to Chinese increase in demand. SiMn production accounted for 68% of total output (13.3 mln mt), HC FeMn for 23% (4.5 mln mt) and Ref FeMn for the remaining 9% (1.7 mln mt).

Global unit consumption of Mn ferroalloys continued to vary significantly from region to region due to different steel production processes, the quality of the raw materials used and types of steel products produced. On average, unit consumption globally remained between 8-10 kg per ton of steel.

**MANGANESE ORE** - production remains high, especially with the new Mn projects in South Africa. Production of manganese ore (Mn contained units) increased by around 1% over 2013 to reach 19 mln metric tons, whereas production of wet metric tons increased by 2% over the previous year to reach 59 mln metric tons. The average grade was just under 31% Mn.

The 6 major producing countries continued to be Australia, South Africa, Gabon, Brazil, Ghana and China. All are major seaborne exporters, except China, which imports roughly 50% of its requirements. China continued to be by far the largest importer, with imports of around 16.4 mln wet metric tons.

ZHOU JIAN replaced Eramet’s Arnaud Vigier as Statistics Committee Chair in April. Zhou is Accounts Manager Mn for Vale Minerals China. Prior to Vale, he worked for Eramet Comilog Shanghai in charge of Mn alloy sales. Zhou started his career at IMnI as Data Manager in 2003.
Market Stats 2014

Figure 1. Steel Production (million mt)
over 1.6 billion mt of crude steel production due to China’s massive contribution

![Steel Production Chart]

Figure 2. Global Mn Alloy Production
low demand outside China, high electricity tariffs and shut downs

![Mn Alloy Production Chart]

Figure 3. Global Mn Ore Production (million mt)
small rise in Mn unit production

![Mn Ore Production Chart]
THE MANGANESE ACADEMY, an IMnI initiative, aims to educate, train and provide guidance to employees of the Institute’s member companies on issues relating to regulatory affairs, health, safety, the environment, and market research.

Designed along the “For Dummies” format, the courses are challenging but fun. They are offered by IMnI staff members during our Annual Conference and other events where the IMnI and members are largely present (Metal Bulletin Conferences, etc.). Dedicated meetings for individual companies can also be arranged, upon request.

Sessions last no longer than 1 hour and “graduates” receive certificates, after successfully completing the course. For more information, contact: imni@manganese.org

REACH Training

“REACH for Dummies” is designed for those new to REACH or those wanting to enter the EU market. Participants include executives from sales, purchasing and shipping functions as well as REACH specialists. A sound understanding of REACH also helps develop a strategy for the EU market as well as globally where REACH-like regulations are introduced. An “Only Representative for Dummies” module is under development.

Regulatory Affairs

In a world where global regulatory demands on Mn players are getting stricter and more comprehensive every day, the threat of inactivity is real; for them, doing nothing is not an option. The IMnI tracks and anticipates major regulations from chemicals management to shipping schedules, and community issues to NGO pressure. Specific training modules can be developed for members or regions depending on needs.

Occupational Health, Environment and Safety

Providing members with strong scientific arguments and best practice guidelines to ensure the sustainability of the Mn industry is at the heart of IMnI’s mission. Course modules cover a range of issues, including Mn science, occupational exposure management and health, worksite safety and analysis of available Mn data and use.

Market Research

Mn Market Research “For Dummies” proposes three modules. The 1st covers “Supply”, the 2nd “Demand” and the 3rd “Supply-Demand Balance & Trade”. These courses are designed to initiate members on how to get the most out of IMnI’s extensive market research data and statistics.
The mission of the OHES Committee 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 and to provide answers.
• 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.

OHES : SOCIAL RESPONSABILITY

The OHES 5-Year Plan (2011 – 2015) is terminating almost one year early and well under budget. The results will not only enhance existing knowledge on manganese but the science used was innovative and allowed us to break new ground. The Life Cycle Assessment for Mn was one such leading-edge study, as it evaluated the Mn industry’s environmental foot print for the first time. In 2015, IMnI will focus on making these results readily available via peer-review publications, conference presentations and proceedings as well as by a special OHES 5-Year Plan Showcase Symposium scheduled for October 2015. We hope to see you there!

Business Focus: 2014 also focused on determining what OHES issues particularly concerned members. A wide selection of IMnI member companies were polled at various levels (Mgmt., sales, plant managers and OHES professionals), so as to understand what were the common issues within the Mn industry that could form the backbone of future collaborative projects. OHES Chairman Branislav Klocok, is using already-established scientific know-how, alongside the information revealed by the poll, to formulate the next strategic OHES Plan. The next Plan will aim to provide best practice tools that not only protect workers and the environment, but also increase industry profitability.

I MnI’s Regulatory Affairs Committee was established in 2011 to support members’ compliance with current and future regulatory requirements. The committee’s primary objectives are to:
1. Monitor and report on upcoming regulations
2. Participate in ‘embryonic’ regulations
3. Support members’ compliance with current and future regulatory needs
4. Build a Socio-Economic Assessment (SEA) defence case
5. Network with regulators and other industry Associations

In addition, the committee’s lobbying and advocacy activities grew significantly in 2014. The committee meets annually in different geographical locations to encourage member participation and to present the opportunity to discuss issues of regional as well as global significance. IMnI members are informed of developments via a monthly Newsflash and quarterly Asia Review.

Areas of focus include support for IMnI members’ preparation for the introduction of REACH-type regulations globally (particularly in Asia) plus tools, guidance and position statements to address changes in international shipping codes for manganese ores and ferroalloys. The committee also worked to develop the industry’s first Socio-Economic Assessment (SEA), including members case studies.

BRANISLAV KLOCOCK was named Chairman of the OHES Committee in January 2014, specifically tasked by IMnI’s Chairman to bring a business focus to the committee and to IMnI’s OHES activities. Managing Director of Slovakian Mn alloy producer OFZ, Mr. Klocok was prior to that Manganese Commercial Director for Vale.

CATHY REICHARDT has chaired the Regulatory Committee since the start. She is Ore & Metal’s Senior Manager: Safety, Health, Environment, Risk & Quality, and has nearly 30 years of experience in the mining and minerals processing sector throughout sub-Saharan Africa and the Asia/Pacific region.
• Focuses the activities of the IMnI on behalf of the global manganese industry to include the specific interests of those companies currently producing electrolytic manganese metal (EMM) and electrolytic manganese dioxide (EMD).

• Collects and organizes trade data and distributes trade reports for the products of the membership.

• Provides coverage and weekly analysis of EMM and EMD markets in China through on the ground investigation by our IMnI China Representative.

• Acts as a forum for discussion of industry matters, particularly those relating to health, safety, environment and community issues.

Global Electrolytic Mn Metal (EMM) continues to be almost exclusively produced in China, which accounts for over 95% of total world production. China produced an estimated 1.1-1.4 million mt of the metal in 2014. 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 over 322K mt of EMM in 2014, which is 23% more than the official exports in 2013. Other applications for which EMM is a vital ingredient include aluminium, specialty steels 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. Total annual production capacity is roughly 422K mt. 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 & Belgium, Ningxia Tianyuan Manganese Industry, Quintal in Columbia, and Tosoh in Greece & 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 11th EPD China Conference in Guiyang on March 29, 2014 with its 4 Chinese partners. It was the largest global EPD conference of the year with around 140 delegates in attendance. Despite industry consolidation and challenging market conditions, it once again proved itself to be the premier global EPD event. The program was filled with first rate international and domestic speakers who covered market dynamics and trends within these industries.

Major topics covered included:
• Cost analysis of Chinese EMM companies
• China’s EMM industry update and outlook
• EMD industry overview and forecast
• Demand and forecasts for the battery market and Chinese Stainless Steel 200 Series.

Our 12th EPD China Conference will be held on June 12, 2015 to piggy-back with IMnI’s Annual Conference in China, thus allowing delegates to attend both events. For information about IMnI conferences, contact us at: events@manganese.org
The M&C Committee is responsible for:

• The Annual Conference, along with other seminars and events.
• Publications, such as the Manganese Matters newsletter, the Annual Review, the India & China Weeklies.
• The website.
• The membership drive.
• Establishing links with universities and research institutes working on new or improved ways to use Mn.
• Ensuring that members are heard, their needs comprehended and met, when possible, and encouraging them to take an active role in the Institute’s activities.

The objectives for IMnI’s Marketing & Communications remain unchanged: grow membership while ensuring members satisfaction. A tall order and, in these especially challenging times, one that now requires the Institute to review its messages and tools. This process began in 2014 and will continue into 2015.

China and India remain priorities. The China Statistics Committee continues to be one of the cornerstones of IMnI’s Chinese presence. Chaired by Cheng Bin (Shanghai Jinneng International Trade Co.), with the support of Vice-Chair Zhou Jian (Vale) the committee has two primary goals: to allow IMnI to better understand the Chinese market and to have Chinese members participate in the improvement of IMnI’s Statistics Service.

For India, IMnI released an in-depth India Market Study, thanks to data provided by IMnI’s members there and reliable local sources.

In 2014, the Institute continued efforts to reinforce its relationship with members and raise its profile around the world.

Two days of technical tours organized just prior to the conference offered a selection of 6 separate visits: the 1st to the 4 new mines – UMK, Tshipi Borwa, Kudumane and Kalagadi’s mine and sinter plant; the 2nd to the port of Ngqura and Port Elizabeth; the 3rd to MMC’s EMM plant and Delta’s EMD plant; the 4th to Transalloys’ plant; the 5th to Durban Port; the 6th to Metalloys’ Mn alloys plant and Mogale.
IMnI’s 2 Flagship Events Back-to-Back
ATTEND BOTH FOR A DISCOUNT!

IMnI’s 40th Annual Conference
May 28-30 2014
Table Bay Hotel
Cape Town
South Africa

IMnI’s 41st ANNUAL CONFERENCE
Tuesday, June 16 - Thursday, June 18 2015
Shanghai Portman Ritz-Carlton
Shanghai, China

“China at the Crossroads: Into the Mouth of the Dragon”

The 12th Electrolytic Products Division (EPD) Conference
Friday June 12, 2015
Four Points Hotel
Shenzhou Peninsula, Hainan Province

TECHNICAL TOURS TO CHINA’S TOP Mn SMELTERS
Saturday June 13 - Monday June 15

For information contact:
events@manganese.org
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 & 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 two sub-committees: Regulatory Affairs (an arm of the OHES Committee), and the China Statistics Committee. 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.

**Statistics Committee**
- Zhou Jian (Chairman)
- Jay Cho
- Leslie Lie
- Sabine Jacquet
- Antonio Salinas
- Toshiaki Abe
- Colin Ouwehand
- Georg Dreiskaemper
- Juan Bosco Alvarez
- A.K. Mehra
- Adriele Oliveira
- Martin Levick
- Aloys d’Harambure
- Anne Tremblay
- Vale Minerals China Co. Ltd
- Asia Minerals Ltd.
- BHP Billiton
- Eramet Comilog Manganese
- FerroAtlantica, S.A.
- Japan Ferroalloy Association (JFA)
- OM Tshipi (S) Pte Ltd.
- L&M Handels AG
- Minera Autlán, S.A.B. de C.V.
- MOIL Limited
- Vale
- OFZ, a.s.
- IMnI Market Research Manager
- IMnI Executive Director

**OHES Committee**
- Branislav Klocok (Chair)
- Athena Keene
- Jenny Cronje
- Blanca Gurrola
- Bernd Friede
- Pierre Rousseau
- Cristina Rodriguez
- François Blond
- Leon Arthur
- G.P. Kundargi
- Tiaan van Aswegen
- Doreen McGough
- Anne Tremblay
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- Asia Minerals Ltd.
- Compañía Minera Autlán, S.A.B. de C.V.
- Consolidated Minerals Ltd.
- CRCE Materials Co. Ltd.
- Eramet Comilog Manganese
- FerroAtlantica, S.A.
- Fesil Sales S.A.
- Glencore International AG
- Hanwa Co., Ltd.
- OFZ, a.s.
- Ronly Ltd.
- Simpact Metalloy Co. Ltd.
- Traxys Europe S.A.
- IMnI Executive Director
- IMnI Market Research Manager
- IMnI China Representative

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- Zhou Jian (Vice-Chair)
- Shanghai Jinneng International Trade Co., Ltd
- Vale Minerals China Co. Ltd

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- Buks Botes (Vice-Chairman)
- Li Tongqing
- Praveen Baijnath
- Hervé Montegu
- Leon Arthur
- Tan Zhuzhong
- Hiromu Otsuka
- Anne Tremblay
- Sophie Liu
- Aloys d’Harambure
- CITIC Dameng Mining Industries Ltd.
- Manganese Metal Company (MMC)
- CITIC Dameng Mining Industries Ltd.
- Delta EMD
- Eramet
- Manganese Metal Company (MMC)
- National Friendship Assoc. of EMM
- Tosoh Corporation
- IMnI Executive Director
- IMnI China Representative
- IMnI Market Research Manager
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Arnaud Tissidre, Eramet Comilog Manganese

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Ruan van Schalkwyk (Treasurer), Glencore International AG
Li Weijian (EPD Committee Chairman), CITIC Dameng Mining Industries Ltd.
Jian Zhou (Statistics Committee Chairman), Vale Minerals China Co. Ltd.
Colin Ouwehand (M&C Committee Chairman) OM Tshipi (S) Pte Ltd.
Anne Tremblay, IMnI

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Pedro Larrea (Vice Chairman), FerroAtlantica, S.A.
Ruan van Schalkwyk (Treasurer), Glencore International AG
John Slaven, BHP Billiton
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John Raubenheimer, OM Holdings Ltd.
Alastair Stalker, Ore & Metal Company
James Jin Shik Choi, Simpac Metallloy Co. Ltd.
Johan Kriek, United Manganese of Kalahari
Marcos Dantas, Vale
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Chairman: Li Weijian, CITIC Dameng Mining Industries Ltd.

Treasurer
Ruan van Schalkwyk, Glencore International AG

Executive Director
Anne Tremblay, IMnI
### ORDINARY MEMBERS

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### AFFILIATE MEMBERS

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### ELECTROLYTIC PRODUCTS DIVISION (EPD)

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