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.

Health, Safety & Environment

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  hse@manganese.org  events@manganese.org

IMnI provides vision and guidance to the manganese industry by promoting economic, social and environmental responsibility and sustainability for all stakeholders.

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Message from the Chairman:

“... no single manganese producer can be successful without the Institute’s support...”

The manganese industry, like all other metal and raw material industries, has entered an extremely difficult period. A combination of events, notably the rapidly maturing Chinese economy, amplified by the excess capacity built in steel and manganese production in China in 2008 and 2009, and the destructive impact of Chinese steel exports on the steel industry elsewhere, is limiting the growth of demand as well as transforming the geographical pattern of consumption.

The added Mn ore and alloy capacity decided during the “boom years” is now on the market, resulting in considerable overcapacity in manganese ore and alloys.

In addition, the evolution of currencies has driven USD prices down on the back of the very steep depreciations encountered by the South African rand, the Brazilian real, the Russian rouble, the Ukrainian hryvnia, the Mexican peso and, to a lesser extent, the Australian dollar.

As a consequence, manganese is one of the worst performing commodities today with prices back to rock-bottom levels not seen since the 90s.

At a time when a large part of the industry is struggling to survive, the International Manganese Institute can help member companies reduce their costs. Expensive follow-up of national and international regulations, scientific studies required to properly inform authorities and protect workers, gathering of market data... can all be mutualized thanks to the Institute.

This is also a period when the IMnI needs to count on the support of its members, who will make sure that short term priorities do not hinder long term objectives. Our industry - thanks to the Institute - has achieved great results in terms of producing scientific and social data on manganese. Further actions, towards regulators for instance, will be required and no single manganese producer can be successful without the Institute’s support.

Finally, while we now know that manganese does not create specific risks when used normally, it would be better if this “good news story” was made public knowledge. In fact, the Institute’s Supervisory Board has set this as a priority for the management – develop and promote our industry and metal, Mn.

Arnaud Tissidre
Chairman of the IMnI

Message from the Executive Director:

“IMnI’s ‘value proposition’ remains robust...”

Throughout 2015, challenges continued to accrue for the manganese industry, with producers struggling to adapt to the “new normal”. All had to introduce severe cost-cutting measures; budget items were scrutinized severely, notably that for association memberships.

IMnI was fortunate in that is was able to count on many of its members, who stayed committed to the Institute because they found value in what it had to offer.

Monitoring and reacting to mushrooming national and international regulations, which are increasingly stringent, is only one of the ways IMnI helps industry reduce costs. By acting collectively under the coordination of the IMnI, member companies were able to win several important battles in 2015. One that comes immediately to mind was that against the International Maritime Organization (IMO), which after a year of extensive testing and lobbying on the part of the IMnI, finally agreed to adopt a new SiMn bulk shipping schedule, allowing for significant savings for SiMn shippers.

Other areas where IMnI membership brings cost-savings are when it comes to producing scientific studies required to inform regulators and protect the health of the industry’s workforce, gathering essential market data, and building a case for the “essentiality” of the industry through the acquisition of social and economic data. In all these areas, it makes better business sense to act together than alone.

Besides these ongoing efforts, the year at IMnI was marked by two important milestones:

- The new scientific studies developed under IMnI’s HSE 5-Year Plan (2011-2015), many of them ground-breaking, were showcased at a dedicated symposium at the University of Ottawa in October. The symposium attracted regulatory authorities from Canada, the USA and Europe – the three jurisdictions that largely set the pace and content of environmental and health regulations for the rest of the world. The aim was to encourage these regulators to review their reference values for the environment and health and increase accordingly in light of the fresh science.

- The Marketing & Communications Committee, in operation since 2000, was disbanded and the IMnI’s communication strategy and plan will now fall under the mandate of the Executive Director. The reasons motivating this decision and how it will play out are outlined on page 19.

Despite the times, IMnI’s “value proposition” remains robust and its management team committed to serving the manganese industry.

Anne Tremblay
Executive Director of the IMnI
**IMnI in 2015:**

**JANUARY - MARCH**

- IMnI hosts its 8th China Banquet for the 1st time in Singapore on Wednesday, April 1st, during the Metal Bulletin Ferroalloy Conference. This event, which has now become a tradition, offers IMnI’s China members and potential members the opportunity to meet with non-Chinese producers in an informal setting. With some 70 guests in attendance, this year’s edition was an unmitigated success. IMnI Marketing & Communications Committee Chairman Colin Ouwehand opened the Banquet with a recall of IMnI’s firm commitment to environmental issues.

**APRIL - JUNE**

- A Socio-economic Assessment (SEA) of Mn by Risk & Policy Analysts, an independent UK-based consultancy, and commissioned by the IMnI in 2012, is published. Several members participated as case studies, including Assmang, Eramet, Glencore, FerroAtlantica, Autlan, OFZ.

- IMnI hosts its 12th Electrolytic Products Division (EPD) Conference on Hainan Island on Friday, June 12. The event attracts over 100 delegates. There are 8 presentations followed by a round-table panel discussion, animated by EPD Chairman Li Weijian, Vice-Chairman and CEO of CITIC Dameng Mining Industries Limited.

- IMnI's Regulatory Affairs Committee holds its first regional meeting in Mexico City on July 14 with a focus on regulatory issues affecting countries in North and South America.

- Silicomanganese Schedule sees safe passage at IMO meeting thanks to IMnI’s concerted lobbying efforts.

- Anne Tremblay moderates the Mn panel at Metal Bulletin’s African Ferro-Alloys & Chromite Conference on September 9. Market Research Manager Aloys d’Harambure is the keynote speaker on day 1, delivering his Overview of the Manganese Markets with a Special Focus on Africa to a full auditorium. The Mn Panel includes IMnI members Hilgard Rademeyer (Transalloys), Johan Kriek (United Manganese of Kalahari – UMK) and Brendan Robinson (Tshipi e Ntle).

- Market Research Manager Aloys d’Harambure presents an Overview of the Manganese Industry, with a special focus on the CIS at the Metal Expert Conference in Georgia. He also animates the panel discussion about Iran and the CIS in front of some 80 delegates, mostly from Ukraine, Georgia, Russia, Iran, and some European countries.

- Vietnam Haiduong New Resources Metallurgy Shareholdings Co. joins the IMnI as an Ordinary Member

**OCTOBER - DECEMBER**

- The new scientific studies, many of them ground-breaking, developed under IMnI’s HSE 5-Year Plan (2011-2015) are showcased at a dedicated symposium at the University of Ottawa.

- At Metal Bulletin’s International Ferro-Alloys conference held in November in Prague, Market Research Manager Aloys d’Harambure both presents and animates the Mn session. The Mn Panel features IMnI Chairman Arnaud Tissidre (Vice President Commercial – Ores and Alloys, Eramet Comilog), IMnI Vice-Chairman Esteban Rivero (Vice-Chairman and Commercial & Energy Director, Autlan), IMnI Supervisory Board Member Johan Kriek (Board Member, UMK), IMnI Supervisory Board Member Simon Collins (Head of Business Development, South32).
Manganese in 2015

JANUARY - MARCH

- Russia launches anti-dumping case against Ukrainian SiMn producers.
- EU starts anti-dumping investigation into SiMn imports from India.
- India’s Rohit Ferro-Tech plans to sell ferro-alloy plant in Odisha.
- Gulf Manganese starts development of its manganese alloys smelter in Indonesia.
- Malaysia’s Sakura Ferroalloys scheduled to be commissioned in the fourth quarter of 2015.
- Assmang places Machadadorp FeMn furnace on care and maintenance in South Africa.
- Kudumane Manganese placed under supervision, business rescue proceedings in South Africa.
- Felman Production temporarily shuts West Virginia SiMn furnace in the USA.
- Spain’s Grupo FerroAtlántica and Globe Specialty Metals (GSM) enter $3.1B merger.
- South Africa’s Escom produces first electricity from Medupi power station.
- US starts anti-dumping probe into SiMn imports from Australia.

APRIL - JUNE

- Ferrex ups Mn resource estimate at Togo prospect to 14 million mt.
- Samalaju Industries increases stake in Malaysia’s Sarawak HC FeMn and SiMn project.
- US ITC votes to continue probe into silico-manganese imports from Australia.
- South Africa’s Escom asks ferro-alloys producers to cut power consumption by 10%.
- Gulf Manganese aims for first manganese alloy production in early 2016 in Indonesia.
- Georgian American Alloys to invest $20mn to build a mining facility in Georgia.
- South Africa’s Kudumane Manganese taken out of business rescue.
- BHP Billiton shareholders approve South32 demerger.
- Korea’s Posco develops high manganese steel for liquefied natural gas (LNG) storage systems.
- China to shut 940,000 mt per year of ferro-alloys capacity in 2015.
- South Africa’s Assmang to shut HC ferro-manganese furnace.
- Brazil’s government extends low-priced energy contract for electro-intensive industries.
- South Africa regulator rejects Escom request for 25.3% electricity tariff hike.

JULY - SEPTEMBER

- South32 makes $1.9bn of write-downs at manganese and coal divisions.
- American Manganese eyes lithium ion battery recycling sector.
- Malaysia’s Sakura ferro-alloys project on budget and on schedule.
- Transnet gives South Africa’s Mn producers their rail capacity allocations (MECA2).
- Mexico launches anti-dumping investigation against SiMn imports from India.
- US rescinds anti-dumping review of SiMn imports from Kazakhstan.
- Indonesia awards licence to Gulf Manganese Corporation’s Kupang Mn smelter.
- Transnet equalises Mn ore rail costs in South Africa, requests ‘take or pay’ deals (MECA2).
- US sets preliminary AD duty on SiMn imports from Australia.
- EU decides against provisional measures on Indian SiMn imports.
- South32 upgrades Cannington, GEMCO resource estimates in Australia.
- Amplats opens power plant that turns smelter heat into electricity in South Africa.

OCTOBER - DECEMBER

- Europe SiMn market hits new 6-year low.
- Macedonia’s Skopiski Leguri announces it will not restart Mn-alloys production in 2015.
- US Commerce rescinds Venezuelan SiMn anti-dumping duty review.
- Tata Steel to halt plate production in the UK.
- Gulf Manganese appoints Hamish Bohannan as new CEO.
- Samancor Manganese gives notice on big restructuring process in South Africa.
- Brazil manganese seabed drilling deal signed.
- South32 assesses optimisation of GEMCO in Australia.
- Kosaya Gora signs FeMn contracts with Belarus buyers.
- GMC smelter will ‘open the door’ to Indonesian manganese alloy exports.
- Eurasian Economic Commission proposes 26.3% anti-dumping duty on Ukrainian SiMn.
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. A detailed analysis of IMnI data is also published on a monthly basis.

IMnI 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. All IMnI data is available via our online database and website.

MARKET RESEARCH at IMnI

Manganese Ore and Alloy Market Overview

In 2015 production cuts to adjust to slowing demand

STEEL – China still produces more than half of the world’s output, but its production peaked in 2014. Global crude steel production reached 1.726 billion mt in 2015, according to CRU and Worldsteel, with China producing around 900 million mt. This is the first time that global steel output is down year-on-year since 2009. Global crude steel output was down 1.9% YoY in 2015, mostly because of the slowing steel demand in China. Many large state-owned steel mills in China are subsidized by local governments, in the form of discounts on electricity prices for instance. That is why China’s large steel mills cut production only by 1.6% in 2015, while domestic demand fell by around 3.5%, according to Worldsteel. China’s low-cost excess supply was diverted to the export market, adding pressure on global steel prices, and reducing steel supply in the rest of the world – by 9% in the USA, 5% in Japan, 3% in South Korea, 6% in Turkey and Italy.

MN ALLOYS - Large production cuts in China, India, South Africa and Brazil in 2015, as output adjusted to the lower demand from the steel sector. The world’s output of Mn alloys totaled 16.7 million mt, off 15% on 2014, mostly because of a 20% decrease in China’s production to just over 9 million mt. China cannot export Mn alloys, because of a 20% export tax, and so Chinese companies had no choice but to cut supply in 2015. In the rest of the World, output dropped by 9% to 7.7 million mt, partly because of larger steel imports reducing demand for locally produced Mn alloys. Moreover, some producers had to cut output due to higher electricity prices, especially in India (Mn alloys production was off 14% in 2015), Brazil (-30%) and South Africa (-25%).

MN ORE – Production adjusted to the lower demand from the Mn alloys sector, but high grade output is increasing. Output of low and mid-grade manganese ore dropped in 2015, due to slowing demand from smelters, especially in China, where domestic output dropped 23% YoY. In Ghana, a traditional exporter of low-grade Mn ore to China, production dove by 30% in 2015. Miners in India, Indonesia, Australia, Kazakhstan and South Africa also scaled back mid-grade ore production. However, high-grade manganese ore production increased in Brazil (+4% on 2014), South Africa (+6%), Gabon (+13%) and Australia (+8%).

JIAN ZHOU took over the Chairmanship of the Statistics Committee in April 2015. Jian is an Account Manager Mn and iron ore for Vale Minerals China. Prior to Vale, he worked for Eramet Comilog Shanghai in charge of Mn alloy sales. Jian started his career in Mn at the IMnI, as a student intern serving as Data Manager from April 2003 to April 2004.
Market Stats 2015

Figure 1. Steel Production (million mt) Down 2% from 2014: China still produces more than half of the world’s output, but its production peaked in 2014.

Figure 2. Mn Alloy Production (million mt) Down 15% from 2014: Large production cuts in China, India, South Africa and Brazil in 2015 as output adjusted to lower demand from the steel sector.

Figure 3. Mn Ore Production (million mt) Down 14% from 2014: production adjusted to lower demand from the Mn alloys sector, but high grade production is still on the rise due to growing demand from Chinese newly built furnaces.

* HSE Mission: To provide the industry with guidance, tools and information, based on sound science and independent studies, that will allow it to anticipate the growing demands of global regulation on health, safety and environmental responsibility/accountability, whilst improving worker safety, guaranteeing sustainability and protecting industry profitability.
1. Life Cycle Assessment:  
A First!
- Covers cradle-to-gate life of SiMn, HC FeMn and Ref FeMn
- Provides a comprehensive picture of the industry’s global environmental performance

2. Socio Economic Assessment:  
Key Figures Show Vitality of Mn Industry
- Estimates the socio-economic benefits of the Mn industry to the community worldwide
- 2013: global Mn ore production = ~$11.1 billion (44,000 & 78,000 direct employees)
- 2013 Mn alloy production = US$ 23 billion (67,000 to 86,000 direct workers)

3. Occupational Exposure Limits (OELs):  
New Evidence Provides New Outlook
- Recommends health-based OELs of 0.05 mg/m3 and 0.2 mg/m3 as respirable and inhalable Mn fractions respectively (at 8-hr time weighted averages)
- Proposes introducing sector specific OEL’s as more useful to both workers and industry – a breakthrough!

4. Environmental Risk Assessment (ERA):  
An Encouraging Industry Average
- Assessment of global Mn mining, alloying & chemical emissions to surface waters.
- Results showed > 70% of the participating sites produced emissions below the safe emissions limit.

5. Human Health Risk Assessment:  
New Methods Open New Doors
- Using physiologically-based pharmacokinetic models (PBPK) for risk assessment shows that for an essential nutrient (ex. Mn), toxicity can occur at both high and low exposure levels, and that exposure is from air and food simultaneously
- Exposure to airborne Mn of <10ug/m3 is safe, study concludes

1. Key Facts:
- Event attracts regulatory representatives from the US Environmental Protection Agency (EPA), Health Canada, Environment Canada, the UK Health & Safety Executive (HSE) and more, along with leading Mn scientists, industry HSE professionals and academics
- Organized and supported by the University of Ottawa and Risk Sciences International, Canada

2. Key Outcomes:
- Improves the understanding of Mn toxicology
- Fills knowledge gaps
- Encourages regulators to review their reference values for the environment and health and increase accordingly in light of the new science.
The mission of the HSE 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 HSE topics that can impact on the Mn industry and to provide answers.
• To establish and employ a global network that can provide appropriate HSE 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.

Helping Pave the Way towards Social Responsibility: With the growing need for worker, community and environmental safety, the HSE Committee took stock of what completed projects have addressed these issues and how they have benefited member companies. Rating the studies by frequency of use and importance, the top-ranking studies were summarized in a brochure: IMnI: Your Partner to Guarantee a Responsible Industry: Data and tools for regulatory compliance. The brochure, which serves as a central repository of studies showcasing IMnI’s HSE value proposition, demonstrates industry’s commitment to corporate social responsibility.

Manganese Academy: The Mn Academy, which opened in 2014 continued developing in 2015. With two additional “For Dummies” courses - The Global Harmonized System of Classification and Labeling and Safety Data Sheets – What they mean to your business.

Business Focus – New Directions: After polling members on those HSE issues of particular concern to both their companies and the industry, the committee extrapolated the responses and developed a suite of projects. These projects will be the basis of the next HES plan and are being reviewed by the Supervisory Board.

IMnI’s Regulatory Affairs Committee supports members’ awareness of and compliance to global regulations: regulatory compliance brings with it business continuity. All IMnI members are informed of developments via a monthly Regulatory News and dedicated workshops. Key achievements for 2015 include:

Jan: A meeting at the International Maritime Organization (IMO) in London starts a long effort to amend the IMO’s SiMn bulk shipping schedule

March: K-REACH list of substances for initial registration does not include Mn or Mn-based substances

July: A first “The Americas” Regulatory Affairs Committee meeting is held in Mexico City, hosted by Autlan

Sept: Following extensive testing and lobbying, a new schedule for SiMn bulk shipping (Group C) is accepted by the IMO, allowing significant savings for SiMn shippers

Oct: A summary of IMnI’s Industry Socio-Economic Assessment (SEA) is accepted for publication by the Journal of Extractive Industries and Society

HSE & Regulatory Affairs 2015
A vital partnership for industry

NB: Given that IMnI’s Occupational Health, Environmental and Safety (OHES) committee and activities also cover health questions outside of occupational settings, and in alignment with the terminology used by member companies and other similar associations, the Supervisory Board adopted to change the committee name from OHES to HSE at their June 2015 meeting. With this change now incorporated into our By-Laws, minutes, projects and activities formerly termed “OHES” will be referred to henceforth as “HSE”.

CATHY REICHARDT
Cathy Reichardt has chaired the Regulatory Committee since its start in 2011. 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.

BRANISLAV KLOCOK
Branislav Klocok, Chairman of the HSE Committee since January 2014, is specifically mandated to bring a business focus to IMnI’s HSE activities. Managing Director of Slovakian Mn alloy producer OFZ, Branislav was formerly Manganese Commercial Director for Vale.
**The IMnI Electrolytic Mn Products Division (EPD)**

**The EPD Conference: the premier global EPD event**

**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 million mt of the metal in 2015. 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 330K mt of EMM in 2015, which is 8% less than in 2014. 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 400K mt. IMnI EMD members are present throughout the world supplying major battery companies like Energizer and Duracell. Members include Citic Dameng in China, MOIL in India, Erachem Comilog in the USA & China, American Manganese Inc. in the USA, 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 12th EPD China Conference on Hainan Island June 12, 2015, with over 100 delegates in attendance. Despite industry consolidation and challenging market conditions, it once again proved itself to be the premier global EPD event.

**Major topics covered included:**
- The Development of China’s SS200 Industry
- The Future Development of China’s Imports of Mn Ore
- The Development of the Secondary Battery Market

The panel discussion wrapping up the event focused on: Business Cooperation and Technical Exchanges between Overseas Mn Miners and the Chinese Mn Market.

**Our 13th EPD China Conference** will be held on March 19, 2016 in Nanning.

*For information about IMnI conferences, contact us at: events@manganese.org*

**LI WEIJIAN**

Li Weijian has chaired the EPD Division since 2011. Vice-Chairman & CEO of CITIC Dameng Mining Industries, Mr. Li is also a member of IMnI’s Supervisory Board.
IMnI’s Marketing & Communications Committee was created in December 2000. At that time, the Institute had virtually no communication strategy and very few information tools. The Committee was mandated to remedy the situation.

Over the past 15 years, the M&C Committee has spearheaded multiple accomplishments:

- Establishing IMnI’s Annual Conference as the uncontested premier Mn event
- Creating and developing the IMnI website, which today operates as our principal avenue of communication
- Founding the Annual Review
- Instituting the Electrolytic Products Division (EPD) Annual Conference in China – today the number one venue for EMM & EMD producers worldwide
- Modernizing the IMnI Logo
- and more …

The Institute owes much to the M&C Committee and today pays tribute to its four Chairmen:
- Greg Forbes (Founding Chair 2000-2008)
- Peter Allen (2008-2009)
- Brett Suann (2010-2012)
- Colin Ouwehand (2012-2015)

IMnI’s Marketing & Communications
A renewed approach to communications

In June 2015, the Supervisory Board voted to disband the Marketing & Communications Committee and entrust the IMnI’s Communication Strategy to the Executive Director. Only the Executive Director is in a position to see how the Institute’s multiple missions and projects are intertwined and can consequently produce an overarching communications plan that takes into account all the various components. The reasons for this decision and how it will be put into practice are summarised below:

WHY A NEW COMMUNICATIONS STRATEGY?
World and IMnI Have Changed:
- Membership now multinational and multi-cultural
- Anglo-Saxon style of communication does not work for all
- Challenges surface quickly and have to be addressed fast
- Paper is disappearing, replaced by electronic media

Communication now needs to be transversal; information, audience-driven; and messages, “bespoke”.

HOW WILL IT WORK?
- Communication to be project-driven
- Projects are to be finite, run by Executive Director with, for each project, the help of a small group of dedicated members who have the know-how to answer the challenge at hand

GUIDING PRINCIPLES
- Communicate “bottom up”, not “top-down”
- Test communication tools before, during and after – constantly try to improve
- Include new advocacy and lobbying activities into strategy
- Nurture the trade press
- Use every possible occasion to raise the profile of the IMnI and of Mn

KEEP IT SIMPLE!

MOST IMPORTANTLY:
For information contact:
events@manganese.org

The 13th Electrolytic Products Division (EPD) Conference
Saturday, March 19, 2016
Ming Du Lakeside Hotel
Nanning, China

For information contact:
events@manganese.org
The life of the Institute is regulated by the work done by its committees. There are two standing committees: Health, Safety and the Environment (HSE) and Statistics. 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 HSE 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

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<th>Name</th>
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<tr>
<td>Jian Zhou (Chairman)</td>
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<td>Vale Minerals China Co. Ltd</td>
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<td>Juan Bosco Alvarez</td>
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<td>Jay Cho</td>
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<td>Sabine Jacquet</td>
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<td>Antonio Salinas</td>
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<td>Toshiaki Abe</td>
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<td>Leslie Lie</td>
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<td>South32</td>
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<td>Tsietsi Nkosi</td>
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<td>Martin Levick</td>
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<td>Aloys d’Harambure</td>
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<td>Anne Tremblay</td>
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<td>IMnI Executive Director</td>
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China Statistics Committee

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<tr>
<td>Wang Yue (Acting Chairman)</td>
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<td>Shanghai Jinneng International Trade Co., Ltd</td>
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<td>Jian Zhou (Vice-Chair)</td>
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<td>Vale Minerals China Co. Ltd</td>
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HSE Committee

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<td>Branislav Klocok (Chair)</td>
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<td>Pierre Rousseau</td>
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<td>Eramet</td>
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<tr>
<td>Cristina Rodrigue</td>
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<td>FerroAtlantica, S.A.</td>
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<td>Francois Blond</td>
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<td>Glencore Manganese France</td>
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<tr>
<td>Maria Jassova</td>
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<td>OFZ, a.s.</td>
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<tr>
<td>Tian van Aswegen</td>
<td></td>
<td>Ore &amp; Metal Company Ltd.</td>
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<tr>
<td>Jenny Cronje</td>
<td></td>
<td>South32</td>
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<tr>
<td>Doreen McGough</td>
<td></td>
<td>IMnI HSE Manager</td>
</tr>
<tr>
<td>Anne Tremblay</td>
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<td>IMnI Executive Director</td>
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Regulatory Sub-Committee

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Company/Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cathy Reichardt (Chair)</td>
<td></td>
<td>Assore</td>
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EPD Division

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Company/Location</th>
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<tbody>
<tr>
<td>Li Weijian (Chairman)</td>
<td></td>
<td>CITIC Dameng Mining Industries Ltd.</td>
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<tr>
<td>Buks Botes (Vice-Chairman)</td>
<td></td>
<td>Manganese Metal Company (MMMC)</td>
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<tr>
<td>Li Tongqing</td>
<td></td>
<td>CITIC Dameng Mining Industries Ltd.</td>
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<tr>
<td>Herve Montegu</td>
<td></td>
<td>Eramem</td>
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<tr>
<td>Hiroshi Otsuka</td>
<td></td>
<td>Tosoh Corporation</td>
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<td>Anne Tremblay</td>
<td></td>
<td>IMnI Executive Director</td>
</tr>
<tr>
<td>Sophie Liu</td>
<td></td>
<td>IMnI China Representative</td>
</tr>
<tr>
<td>Aloys d’Harambure</td>
<td></td>
<td>IMnI Market Research Manager</td>
</tr>
</tbody>
</table>

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Ruan van Schalkwyk (Treasurer), Glencore International AG
Anne Tremblay, IMnI

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Ruan van Schalkwyk (Treasurer), Glencore International AG
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Patrick Sacco, Ore & Metal Company
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Simon Collins, South32
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Charles de Rezende, Vale
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Health, Safety & Environment Committee (HSE)
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Glencore International AM, Switzerland
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MOIL Limited, India
Nippon Denko Co. Ltd., Japan
OFZ, a.s., Slovak Republic

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JFE Shoji Trade Corporation, Japan
L&M Group, Switzerland
Marubeni Tetsugen Co. Ltd., Japan
Metmar Limited, South Africa
Mineração Buritirama S.A., Brazil

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Delta EMD (Pty) Ltd., South Africa
Erachem Comilog Inc., U.S.A.
Manganese Metal Company (MMC), South Africa

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Elkem, a.a., Norway

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