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
# Table of Contents

- Message from the Chairman .................................................. 2
- Message from the Executive Director ..................................... 3
- IMnI in 2012 ................................................................. 4
- The Mn Industry in 2012 ..................................................... 6
- Mn Ore & Alloy Market Overview ......................................... 8
- Change 2012: A Renewed Organization ............................... 12
- OHES: Social Responsibility ............................................... 14
- Electrolytic Products Division ............................................. 16
- Marketing and Communications ......................................... 18
- Annual Meetings ........................................................... 20
- IMnI Committees .......................................................... 22
- IMnI Members and Officers ............................................. 24
2012 has been a surprisingly stable year in the manganese industry, considering the external shocks encountered by the global economy and the steel industry. The current period, however, could very well be remembered as the tail end of relative calm before the winds of change sweep through the manganese industry.

The global economy continued to be impacted by the slow-down of the US, European and Chinese economies. The steel industry reversed the gains of the past years and, in the face of falling demand and over-capacity, margins continued to decline.

Sluggish demand and surging supply has negatively impacted the iron ore and metallurgical coal markets. The manganese ore market remained relatively stable, albeit at a low base, as latent capacity remained constrained. Chinese imports stayed strong and port stocks continued to decline. The three ‘super-trends’ of the manganese industry continued to evolve around

• the gradual relocation of smelting capacity from “traditional” producing countries impacted by power shortages and increasing power costs towards “new” greenfield locations supported by low cost power and other comparative advantages.

• the development of new, large and high-grade South African greenfield manganese ore capacity, gradually transforming into long-term structural supply as rail and port infrastructure (eventually) follows, and

• the gradual relocation of smelting capacity from “traditional” producing countries impacted by power shortages and increasing power costs towards “new” greenfield locations supported by low cost power and other comparative advantages.

I remain a firm believer in the long-term structural strength of the Chinese steel industry driven by continued industrialization, urbanization and infrastructure development. The state of the global economy, the steel industry and manganese unit demand will continue to be driven by what (and when and how) happens in China, influenced by the economic co-dependence of the other major global economies.

In terms of the structural changes taking place in the manganese industry, decisive strategic moves by various industry participants clearly demonstrate the winds of change gathering momentum. Closures and expansions, investments and divestments and the relentless need for re-thinking, restructuring and re-optimising everything we do will continue to underpin the dominant short-term trends of the manganese industry - change, transformation and consolidation.

Message from the Chairman:

Short-term trends for Mn – change, transformation and consolidation

If 2012 was an exceedingly challenging year for the Mn industry; it was one of transition and change for the Institute. Our 1st 5-Year Strategic Plan (2007-2012) drew to a close and, looking back, the goals we had targeted at the outset have either been achieved or are that further advanced.

• The IMnI’s market research reports are now considered to be the best available;

• We are promoting “best practices” for occupational health, safety and the environment both by way of annual workshops and through an ambitious OHES program;

• We have continued to develop IMnI as an authority on matters pertaining to Mn;

• And if we do not yet represent 100% of the Mn world, our membership continues to grow and our 91 members represent around 70% of Mn ore units produced worldwide in 2011 and 70% of total alloys (excluding China).

Our next strategic plan (2013-2015) is under development but will surely aim to pursue and complete these goals as well as setting new ones.

2012 also marked a decisive evolution in how the IMnI “works”. After a year of internal discussion, including in-depth interviews of members and staff conducted by past Chairman John Raubenheimer, IMnI adopted a new organizational structure – one meant to streamline decision-making and facilitate operations. Chairman Peter Toth, who had spearheaded the change, unveiled the new structure at the Annual Conference in Cancun. It is detailed in the centrefold (pages 11-13).

Other changes include:

• Vice-Chairmen Paul Doetsch (BHP Billiton) and James Jin Shik Choi (Simpac ANC) under the former organizational structure stepping down and making way for Tom Schutte (Samancor Mn) to take over the sole Vice-Chairmanship under the new. Thanks to them both for their many contributions.

• The departure of Eramet’s Catherine Tissot-Colle after 8 “revolutionary” years at the helm of the OHES Committee and replaced by Samancor’s Riedawaan Pillay.

• Vale’s Branislav Klocok handing over the Chairmanship of the Statistics Committee to Consolidated Minerals’ Ben Cohen after a dynamic 5-year run.

• China Rep Li Yongzhi departs after 6 productive years at IMnI and is replaced by Yinong Shen.

Thanks to all these transformations, IMnI can stride into 2013 re-energized and confident it can meet all new challenges successfully.

Peter Toth
Chairman of the IMnI

Message from the Executive Director:

2012 : a decisive evolution in how IMnI “works”

Anne Tremblay
Executive Director of the IMnI
IMnI in 2012:

JANUARY - MARCH

• Executive Director Anne Tremblay visits Chinese Members in January and begins search for new China Rep.
• IMnI’s 3rd Health & Safety Workshop, sponsored by Ore & Metal Company and BHP Billiton, takes place in Johannesburg from February 28 to March 2.
• Executive Director Anne Tremblay chairs the Mn panel at Metal Bulletin’s 13th Asian Ferroalloys Conference in Hong Kong. Speakers include Jiang Zhu of Minmetals Development Co., David Wellbeloved of Asia Minerals, Kevin Fowkes of AlloyConsult and IMnI Market Research Manager Mark Camaj.
• IMnI holds its 9th EPD (Electrolytic Products Division) Conference in Nanning, China on Saturday, March 31, with its 4 Chinese partners and CITIC Dameng hosting.
• IMnI hires Ms Yinong Shen in March as Representative for Greater China; she replaces Li Yongzhi.
• New members include: Metalmin Metals and Minerals Ltd., Luxembourg Metallurgical Trade (L.M.T.) S.A., Cahya Mata Sarawak Berhad and Segue Resources Limited.

APRIL - JUNE

• IMnI’s Annual China Banquet Dinner takes place during the Ferroalloy.com Conference on May 23 in Beijing. It is hosted by IMnI members: BHP Billiton, Consolidated Minerals, OM Holdings, United Manganese of Kalahari (UMK), Eramet and Vale, who are all present.
• Yinong Shen presents “IMnI’s China Mission & Strategies” at the 9th China Ferro-Alloys International Conference in Beijing, in May.
• IMnI holds its 38th Annual Conference from June 12 to 14 in Cancun, Mexico. Minera Autlan, Erachem Comilog and Vale sponsor the main events. Significant structural changes are voted to IMnI’s organizational structure. (See pages 11-13.)
• New members include: Prince Minerals, Inc., Bligh Mining Pty Ltd., MMC Resources, Inc. and Hanwa Co. Ltd.

JULY - SEPTEMBER

• Market Research Manager Mark Camaj is in China and, accompanied by local rep Yinong Shen, visits members in Shanghai and Beijing and meets with Mysteel and Shanghai Metals Market (SMM), to commission a market research study.
• At the Mysteel Conference held in Tianjin in August, IMnI’s Mark Camaj presents on the Mn industry.
• IMnI publishes three Environmental Risk Assessment (ERA) fact sheets for Mn. These cover the effect and behavior of manganese in water.
• Compagnie Minière du Littoral (CML) replaces Sodemi as an IMnI Ordinary member.

OCTOBER - DECEMBER

• IMnI commissions UK consulting firm RPA to develop a more robust and illustrative socio-economic analysis (SEA), building on its 1st study which it presented at the Annual Conference in Cancun. This 2nd phase will focus on the economic value generated by Mn use in specific steel products and end uses of the supply chain.
• On a 7-day trip through China Executive Director Anne Tremblay and OHES Manager Doreen McGough, accompanied by China Rep Yinong Shen, discuss IMnI’s Life Cycle Assessment with participating companies there and hold a meeting with Chinese members.
• At the Metal Bulletin Ferro-alloy Conference held in Berlin in November, the Mn panel includes IMnI Chairman Peter Toth (OM Holdings). Our Market Research Manager Mark Camaj and Eramet’s Arnaud Vigier give presentations.
• IMnI Executive Director and India Rep Shweta Dharia present at the Manganese/Chrome Ores and Ferro-Alloys Summit in Kolkata, and visit members there as well as in Raipur and Nagpur.
• IMnI launches a review of its China and India service offer. Over 20 CEO’s and senior managers from existing member companies and potential members will be interviewed in both China and India. IMnI can then tailor its services to better meet their needs.
Manganese in 2012

JANUARY - MARCH

• In India OMDC resumes ore mining at Barbil, meanwhile Maithan Alloys concludes 1st phase of ferroalloys project, starts ferroalloy production in Andhra Pradesh.
• In South Africa, Transnet invests in container handling capacity at Port Durban, while Eskom rolls out power buy-back pilot and BHPB stops producing SiMn at Metalloys.
• Areva sells its stake in Eramet to France’s FSI fund.
• Work on OM Holdings smelter in Johor progressing, meanwhile OM Sarawak has secured its power requirements and signed a binding term sheet with Japan firm.
• Former Nizi traders set up Luxembourg Metallurgical Trading (LMT).
• Nippon Denko considers building a new Asian ferroalloys plant.
• China loses WTO appeal on export restrictions, which includes Mn Metal export duties.
• Zambian manganese miner ships first ore to China.
• Felman asks the United States Trade Representative (USTR) to maintain duty-free status for Georgian SiMn.

APRIL - JUNE

• Reunion Gold plans to export Mn ore from Guyana for first time in decades.
• Indonesia imposes 20% tax on raw metal exports, including Mn ore.
• Andhra Pradesh ferroalloy output is down 40% after power costs are raised.
• BHP Billiton decides its Temco Mn plant in Tasmania is still viable. Meanwhile, its Metalloys plant in South Africa ceases production of SiMn, a new HC FeMn furnace will be built.
• Kaboko Mining takes greater stake in Zambian manganese projects.
• Ruukki restarts Mn alloys production at its Mogale plant in South Africa.
• OMH’s Sarawak smelter gets environment approval.
• ArcelorMittal SA is ordered to pay R526m to JV partner in Kalagadi Mn project.
• Transnet announces it will move South Africa’s Mn ore terminal to Ngqura (Coega) by 2014-15. Port Elizabeth will gradually be phased out.

JULY - SEPTEMBER

• Indian alloy producer Hira Group acquires a Mn mine in Turkey.
• MOIL announces it will invest Rs 240 crore to expand capacity at its Balaghat mine.
• Skopiski Legiri idles its furnaces for two months of maintenance.
• Vale sells its European ferroalloys division, which includes its Dunkirk plant in France and its Mo I Rana plant in Norway, to Glencore.
• Noble Group exits the American ferroalloy market.
• Kupang advances its Mn ore project in Indonesia.
• India’s major steel producer SAIL announces it will increase ferroalloy capacity by 70%.
• Kaboko signs a 10-year Mn ore offtake for Zambian mines: gains key license.
• Ningxia Tianyuan plans to increase Mn Metal capacity to 800K mt in 2013.
• Tata Steel unveils branded SiMn product to tap Rs 3000cr Indian SiMn market.
• Nikopol shuts more Mn ferroalloy furnaces due to weak markets.

OCTOBER - DECEMBER

• ArcelorMittal announces it will close its Florange plant in France.
• OM Materials starts work on new ferroalloys project in Sarawak, Malaysia.
• Chinese manganese ore port inventory falls to 29 month low.
• Indian Steel minister advises MOIL to acquire Mn mines abroad; mining in Goa is banned.
• Eskom seeks yearly increases of 16% to South Africa electricity rates until 2018.
• New South African producers coming on stream: Tshipi Borwa mines its first Mn ore, while Asia Minerals brings its Kudumane Mn mine online in December.
• Metal Bulletin launches 2 Mn ore indexes: 44%Mn CIF Tianjin, China and 38%Mn FOB South Africa.
• Felman Trading Europe is established.
• ArcelorMittal sells its 50% stake in Kalagadi Manganese to the project founder and Kalagadi chairperson Daphne Mashile-Nkosi.
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 Research Manager, 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.

**MARKET RESEARCH at IMnI**

STEEL – ran out of steam, may show slight rise.
Global production of crude steel should post very little or no rise by year’s end in 2012. Through the first 10 months, output increased less than 1% year-on-year (y-o-y) to an annualized 1.52 bln mt. The European Union, which has been wading its way through a severe crisis, experienced a 4.7% decrease in output during the first 10 months. Things were somewhat better in N. America, where output rose by 3.3% during the same period. China continued to be the largest producer by far, after accounting for nearly 47% of total output. Its growth rate fell to 2.3% from around 9% the year before, with annualized production of around 712 mln mt. Due to this slowdown it was unable to drive up overall global production as it has in recent years.

MANGANESE ALLOYS - demand subdued, supply abundant.
The fragile states of major economies led the Mn alloy sector to suffer from weak demand and oversupply. IMnI estimates that 17.5 mln mt. of Mn alloys were produced in 2012, down 2% y-o-y. SiMn production accounted for 66% of total output (11.5 mln mt), HC FeMn for 25% (4.4 mln mt) and Ref FeMn for the remaining 9% (1.6 mln mt). Fierce competition amongst domestic producers and exporters in a weak demand environment continued to hamper the performance of alloys. 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. Due to our upward revision of China’s SiMn unit consumption our global average estimate was 11.5 kg Mn alloys per mt of steel. However, most countries still fell between 8-10 kg.

MANGANESE ORE – production dips, market stable.
Mn ore production (Mn units contained) likely declined by around 5% to just over 16 mln mt from around 17 mln mt in 2011. Production in Wet mt declined at a slower rate of around 4% to 53 mln mt, suggesting a higher share of lower grade ores in 2012 compared with 2011. The average grade was just under 31%Mn. The 6 major producing countries continued to be China, Australia, S. Africa, Gabon, Brazil and Ghana. 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 13 mln wet mt. It also went through a cycle of destocking, with more than 1 mln mt of ore stocks at major ports being consumed.

STATISTICS CHAIRMAN BRANISLAV KLOCOK stepped down after 5 fruitful years. Under his guidance IMnI’s Market Research improved with its “Back to Roots” initiative. The goals: simplify reports, and improve statistics. Major achievements include: creating a secure member data submission website; moving to monthly reporting; and introducing an online database allowing for custom querying of IMnI data.

**Manganese Ore and Alloy Market Overview**

**2012, A Challenging Year**
Market Stats 2012

Figure 1. Steel Production (million mt)

Figure 2. Global Mn Alloy Production

Figure 3. Global Mn Ore Production (million mt)

IMnl now has a new dynamic structure in which to operate more efficiently. It took a year of internal discussion to elaborate IMnl’s renewed organizational structure – one meant to streamline decision-making and facilitate operations. With this transformation, IMnl is better prepared to meet the ambitious goals it has set for itself.
A Renewed Organization

IMnI’s new organizational structure includes a Supervisory Board, enlarged to better represent the full breadth and width of the industry and our membership, and an Executive Board. A sub-set of the Supervisory Board, the Executive Board is small and execution-focused with a mandate to “manage & supervise” the affairs of the Institute.

At the Annual Conference in Cancun, Chairman Peter Toth unveiled IMnI’s new organizational structure, a process he had personally spearheaded.

The General Assembly remains the ultimate centre of power, where all Institute affairs are presented, reviewed, discussed and ultimately approved. The new Supervisory Board, 15-member strong, is larger and more diverse than the previous Board. It is mandated to set and oversee the execution of IMnI’s strategic vision; it now includes Affiliate members, as well as Ordinary members, and meets twice a year.

The Executive Board, enlarged to 7 members, is responsible for providing short-term strategic and operational guidance, as well as implementing a progress review framework for IMnI’s executive team. It meets 4 times a year.

The IMnI continues with three committees (Statistics, Ohes and Marketing & Communications), three sub-committees (India, China and Regulatory Affairs) and the EPD Division. Affiliate members now have the right to vote and hold executive office. Voting rights are based on members’ size.
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 2012:
Improving worker safety, increasing industry profitability

The OHES 5-Year Plan gained significant speed in 2012 which marked the second year of the plan. Major progress was achieved across all 5 goals with 4 projects aiming for completion in 2013. Working together with a suite of scientists, the 5-Yr plan has not only made good progress but has already enhanced scientific knowledge and broken new ground. An update follows:

Goal 1: Anticipate & track global regulations. The Regulatory Committee - commissioned with tracking and interpreting implications of regulations for industry, whilst supporting members’ compliance - is already well established. This committee reviews emerging issues at its annual meeting. This year it was faced with REACH-like regulations spreading worldwide, Mn risk assessments and transport regulations aligning with the Global Harmonized System of Classification & Labeling.

Goal 2: Develop economically sound industry safety standards. Risk Sciences International (RSI Canada) and the University of Cranfield (UK) were tasked with identifying appropriate industry safety standards - finding a reliable biomarker and a globally acceptable occupational exposure limit (OEL) for the Mn industry. Both consultants are nearing the finish line and final results are due in 2013.


Goal 4: Quantify and evaluate environmental life cycle & risk. The Life Cycle Assessment, identified as a key initiative to promote sustainability, defined its goal & scope to meet the ISO 14040 standard. This cradle-to-gate project made giant strides by collecting data from 80% of participating member companies. Toronto consulting firm Hatch is currently completing data collection and working on modeling.

Goal 5: Knowledge-sharing and best practice. As part of the IMnI’s campaign to raise the bar on health and safety, the third workshop focused on controlling dust emissions and reducing exposure. Jointly hosted by Ore & Metal Company and Samancor Mn, the workshop in Johannesburg was a resounding success with 37 delegates representing 19 companies and 4 continents.

CATHERINE TISSOT-COLLE chaired the OHES Committee for the past 8 years. It is thanks to her passion and single-minded determination that the IMnI today has come to put occupational health, environment and safety issues at the heart of its agenda. The REACH Mn Consortium and the 2011-2015 OHES 5-Year Plans are the two major pillars of her remarkable legacy. But they are not the only ones. By fighting to create the post of OHES Manager, and succeeding, she further enriched the Institute. Hers was a remarkable contribution and for that we owe her thanks.
ELECTROLYTIC PRODUCTS DIVISION

- Focuses the activities of the IMnI on behalf of the global manganese industry to include the specific interests of those companies who are currently producers of 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 and environment issues.

Global Electrolytic Mn Metal (EMM) continues to be almost exclusively produced in China, which accounts for over 95% of total world production. It produced an estimated 1.3-1.4 million mt of the metal in 2012. 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 125K mt of EMM in 2012. 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, 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 9th EPD China Conference in Nanning on March 31, 2012 with its 4 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 market dynamics and trends within these industries. Delegates actively participated in the forum which followed the conference, generating constructive debate on the major issues within the industries.

Major topics covered included:
- Technology-based Clean Production Models for EMM & EMD
- Utilization of Imported Mn Ore in EMM Production
- Development of China’s Stainless Steel Industry & Impact on Mn demand
- Market Trends and Forecasts for EMM, EMD and Stainless Steel 200 Series
- The Market for Lithium Secondary Batteries (containing Mn) and Future Developments

Our 10th EPD China Conference will be held on April 1, 2013 in Changsha. For information about IMnI conferences, contact us at: events@manganese.org
IMnI’s
Marketing & Communications

**Continued efforts to reinforce relationship with members**

**OUTREACH TO MEMBERS** Throughout 2012, the Institute made continued efforts to reinforce its relationship with members, while raising its profile around the world.

The IMnI both hosted and was featured at a number of events in China, India and Europe.

The Electrolytic Products Division (EPD) held its 9th EPD China Conference in Nanning on March 31. 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 4 major Chinese partners: the National Committee of Manganese Industry Technology (NCMIT), the National Friendship Association of Electrolytic Manganese Metal, the National Friendship Association of Electrolytic Manganese Dioxide, and Hunan Jiufeng Metal Exchange. It was hosted by CITIC Dameng.

On May 23, IMnI held its 7th China Ore and Alloy Banquet -- an informal get-together between Chinese and Western producers -- during the Ferroalloy.com Conference, in Beijing.

In December, Executive Director Anne Tremblay and India Representative Shweta Dharia visited Indian members in Kolkata, Raipur and Nagpur. These visits coincided with the Manganese/Chrome Ores and Ferro-Alloys Summit held in Kolkata where Mrs Tremblay and Dharia were guest speakers.

In addition to these member-directed initiatives, IMnI continued to be in demand at industry conferences. IMnI members Jiang Zhu of Minmetals and David Wellbeloved of Asia Minerals, along with Market Research Manager Mark Camaj were guest speakers at Metal Bulletin’s Ferroalloy Hong Kong Conference in the Mn panel, chaired by IMnI’s Executive Director. The invitation was renewed by Metal Bulletin for its International Ferroalloy Conference in Berlin in November, where speakers included IMnI Chairman Peter Toth of OM Holdings, Arnaud Vigier of Eramet and IMnI’s Mark Camaj.

**THE ANNUAL CONFERENCE: CANCUN** IMnI’s Annual Conference has emerged as the Mn ore and Mn Ferroalloy industries’ premier event. The 2012 edition in Cancun once again confirmed its reputation. Attendance was over 170, making it one of the most well-attended to date. The Conference theme -- “The New Age of the Manganese World: Lessons from the Mayan Culture” -- generated animated exchanges. Guest speakers included Pedro Aspe, Former Secretary of Finance of Mexico and Everardo Elizondo, Former Deputy Governor, Banco de Mexico.

**MEMBERSHIP DRIVE** Membership continued to grow with 9 more companies joining our ranks. Australia and the United States each produced two, with the Ivory Coast, Japan, Luxembourg, Malaysia and Mauritius each providing one. (Names of new members appear on pages 4-5.) For manganese players, the International Manganese Institute (IMnI) continues to be the industry’s most effective and reliable long-term partner.
IMnl’s 38th Annual Conference
June 12-14, 2012
The Ritz-Carlton Cancún
Mexico

IMnl’s 39th Annual Conference
Swissôtel The Bosphorus
Istanbul, Turkey
Theme: East Meets West
Tuesday, June 4 - Thursday, June 6, 2013

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

OTHER IMnl EVENTS IN 2013

7th CHINA BANQUET
Hong Kong, Monday, March 25

10th ELECTROLYTIC PRODUCTS DIVISION (EPD) CONFERENCE
Changsha, Monday, April 1

4th OHES HEALTH & SAFETY WORKSHOP
Nanning, Tuesday-Wednesday, April 23-24
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). In addition to these standing committees, there are three sub-committees: Regulatory Sub-Committee (an arm of the OHES Committee), along with the China and India 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 the Institute’s fundamental missions.

IMnI Committees 2012

IMnI’s Executive Board

The Executive Board, a sub-set of the Supervisory Board, is formed by the Chairman, Vice-Chairman, Treasurer, Executive Director, and the Chairs of the three standing committees. It is responsible for providing short-term strategic and operational guidance as well as implementing a progress review framework for the IMnI team.

Statistics Committee

Ben Cohen (Chairman)
Jay Cho
Simon Sullivan
Arnaud Vigier
Antonio Salinas
Ruan Van Schalkwyk
Toshiaki Abe
Georg Dreisakemper
Juan Bosco Alvarez
A.K. Mehra
Ivan Tan
Denny Sabah
Adirele Oliveira
Mark Camaj

OM Materials Pte Ltd.
BHP Billiton
Eramet Comilog Manganese
FerroAtlântica, S.A.
Glencore
Japan Ferroalloy Association
LBM Group
Minera Autlan, S.A.B. de C.V.
MOIL Limited
OM Holdings Ltd.
Ronly Holdings Ltd.
Vale
IMnI

Marketing & Communications Committee

Colin Ouwehand (Chairman)
Peter Allen
Arnaud Tissidre
Antonio Salinas
Ruan Van Schalkwyk
Alberto Saavedra
Nori Bali
Manish Sarda
James Jin Shik Choi
Stanislav Huba
Shweta Dharia
Yinong Shen
Mark Camaj
Anne Tremblay

OM Materials Pte Ltd.
Consolidated Minerals
Asia Minerals Ltd.
BHP Billiton
Eramet Comilog Manganese
FerroAtlântica, S.A.
Glencore
Japan Ferroalloy Association
LBM Group
Minera Autlan, S.A.B. de C.V.
MOIL Limited
OM Holdings Ltd.
Ronly Holdings Ltd.
Vale
IMnI

EPD Division

Li Weijian (Chairman)
Pietro Amico (Vice-Chairman)
Thomas Glück
Li Tongqing
Praveen Bajnath
Leon Arthur
Buks Botes
Li Yongzhi
Naoshi Hatakeyama
Masaki Iwasaki
Yinong Shen
Mark Camaj
Anne Tremblay

CITIC Dameng Mining Industries Ltd.
Erachem
Baja Mining Corp.
CITIC Dameng Mining Industries Ltd.
Delta EMD (Pty) Ltd.
Manganese Metal Company (MMC)
Manganese Metal Company (MMC)
Ningxia Tianyuan Manganese Industry Co., Ltd.
Tochdiff Corporation
Tochdiff Corporation
IMnI
IMnI
IMnI

OHES Committee

Riedawaan Pillay (Chair)
Jerry M. Roper
Bernd Friede
Pierre Rousseau
Francois Blond
Antonio Salinas
Leon Arthur
D. Shome
Tian van Aswegen
Doreen McGough
BHP Billiton
Afton Chemical
Elkem
Eramet
Glencore Manganese France
FerroAtlântica, S.A.
Manganese Metal Company
MOIL Limited
Ore & Metal Company
IMnI

Regulatory Sub-Committee

Cathy Reichardt (Chair)
Assore
Cathy Reichardt

Pietro Amico

Li Weijian

Colin Ouwehand
IMnI Members and Officers

ORDINARY MEMBERS

Asia Minerals Ltd., China (Hong Kong)
China National Minerals Co. Ltd., China
Chinalight Resources Imp. & Exp. Corp., China
Chuo Denki Kogyo Co. Ltd., Japan
Compagnie Minerale de Littoral (CML), Ivory Coast
Consolidated Minerals Ltd., Jersey
Dongbu Metal Co. Ltd., South Korea
Eramet Comilog Manganese, France
FerroAtlantica, S.A., Spain
Guangxi Xin-Manganese International Trading Co., Ltd., China
Hira Ferro Alloys Limited, India
Indifol Hydro Power & Manganese Limited, India
JSC Zhaiyremski GOK, Kazakhstan
JSL Limited, India
Maithan alloys Limited, India
Mineração Buritirama S.A., Brazil
Maithan Alloys Corporation, India
Baja Mining Corp., Mexico
Aria International GmbH, Austria
ArcelorMittal, U.S.A.
ArcelorMittal, U.S.A.
Afton Chemical Corp., U.S.A.
Mogale Alloys (Pty) Ltd., South Africa

AFFILIATE MEMBERS

Alton Chemical Corp., U.S.A.
ArcelorMittal, Luxembourg
Aria International GmbH, Germany
Baja Mining Corp., Canada
Bligh Mining Pty. Ltd., Australia
Buchans Minerals Corporation, Canada
Cahya Mata Sarawak Berhad, Malaysia
Carus Corporation, U.S.A.
Centre de Recherches Metallurgiques (CRM), Belgium
DCM DECOmetal International Trading GmbH, Austria
Eklem AS, Norway
Glencore International AG, Switzerland
Hanwa Co., Ltd., Japan
Italiana Prodotti Minerale S.R.L. (I.P.M.), Italy
Kalagadi Manganese Pty Ltd., South Africa
L&M Group, Switzerland
Luda Commodities, Switzerland
Luxalloys S.A., Luxembourg
Luxembourg Metallurgical Trade (L.M.T.) S.A., Luxembourg
Marubeni Tetsugen Co. Ltd., Japan
Metalmin Metals and Minerals Ltd., Mauritius
Metmat Limited, South Africa
Minerais US LLC, U.S.A.

ELECTROLYTIC PRODUCTS DIVISION (EPD)

CITIC Dameng Mining Industries Ltd., China
Delta EMD (Pty) Ltd., South Africa
Erachem Comilog Inc., U.S.A.

MOIL Limited, India
Nippon Denko Co. Ltd., Japan
OFZ, s.r.o., Slovak Republic
OM Holdings Ltd., Singapore
Ore & Metal Co. Ltd., South Africa
Rohit Ferro Tech Limited, India
Rusmetal Ltd., Georgia
Samancor Ltd., South Africa
Sardia Energy & Minerals Ltd., India
Shaw River Manganese Limited, Australia
Sichuan Chuantou Emei Ferroalloy (Group) Co. Ltd., China
Simpac Metallcoy Co. Ltd., South Korea
S.K. Sarawagi and Co. Pvt., Ltd., India
Skopski Leguri Dooel, Macedonia
Tata Steel Limited, India
United Manganese of Kalahari (Pty) Ltd., South Africa
Vale, Brazil

Mitsui & Co. UK Plc., Japan
MMC Resources, Inc., U.S.A.
Montezuma Mining Company Ltd., Australia
Niz International S.A., Luxembourg
Noble Resources Ltd., China (Hong Kong)
Ntsimbintle Mining (Pty) Ltd., South Africa
Omni Industries BV, Netherlands
On Falih Development Ltd., China
POG-HMCo Ltd., South Korea
Prince Minerals, Inc., U.S.A.
Reunion Gold Corp., Canada
Ronly Limited, United Kingdom
Segue Resources Limited, Australia
Shanghai Jinneng Resources, China
Sibelco Europe MineralsPlus, Netherlands
Simbol Materials, U.S.A.
Sineco S.p.A., Italy
SKI Shanghai Limited, China
Sojitz Corporation, Japan
Spithire Resources Ltd., Australia
Sumitomo Corporation, Japan
Tokyo Boeki Steel & Materials Ltd., Japan
Traxys Europe, France
Tshiipi & Ndle Manganese Mining (Pty) Limited, Australia

Manganese Metal Company (MMC), South Africa
Ningxia Tianyuan Manganese Industry Co. Ltd., China
Quintal S.A., Colombia
Tosoh Corporation, Japan

OFFICERS

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Tom Schutte (Vice Chairman), BHP Billiton
Guillaume “Lion” Kirkels (Treasurer), SIBELCO Europe MineralsPlus
Riedwaan Pillay (OHES Committee Chairman), BHP Billiton
Ben Cohen (Statistics Committee Chairman), Consolidated Minerals
Colin Ouwehand (Marketing & Communications Committee Chairman), OM Holdings Ltd.
Anne Tremblay, (Executive Director), IMnI

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Guillaume “Lion” Kirkels (Treasurer), SIBELCO Europe MineralsPlus
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Li Weijian, CITIC Dameng Mining Industries Ltd.
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Alastair Stalker, Ore & Metal Company
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Sergiy Maxymenko, Ukrainian Ferroalloys and other Electrometallurgy Products Manufacturers (UkrFA)
Marcos Dantas, Vale
Anne Tremblay, IMnI

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OCCUPATIONAL HEALTH, ENVIRONMENT & SAFETY COMMITTEE (OHES)
Chairman: Riedwaan Pillay, BHP Billiton

STATISTICS COMMITTEE
Chairman: Ben Cohen, Consolidated Minerals

MARKETING & COMMUNICATIONS COMMITTEE
Chairman: Colin Ouwehand, OM Materials Pte Ltd

ELECTROLYTIC PRODUCTS DIVISION (EPD)
Chairman: Li Weijian, CITIC Dameng Mining Industries Ltd.

Executive Director
Anne Tremblay, IMnI
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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Provides the most comprehensive reports & tools available on manganese supply, demand and trade flows.

stats@manganese.org

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

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