

International Manganese Institute (IMnI)

Monthly Report February 2020

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Upcoming IMnI Event

IMnI Annual Conference 2020

June 2 to 4, 2020, Cape Town (South Africa)

[Register here](#)

- **10 technical visits available on June 1 and June 5:**
 - South32 Mamatwan
 - Tshipi
 - UMK
 - Kudumane
 - Assmang Gloria
 - Assmang Nchwaning
 - Transnet Port Elizabeth & Coega
 - Manganese Metal Company (MMC)
 - Transalloys
 - Kalagadi mine & sinter plant
- **Presentations by industry experts (major Manganese producers and consumers)**
- **200+ international delegates of the Manganese industry expected to attend**

22 new IMnI Members in 2018 & 2019

22 companies joined IMnI in 2018 and 2019, including 10 from China and 3 from India:

- most of these new IMnI Members are producers of Manganese (Ordinary or Chemical category),
- and the others are traders or industry service providers.

IMnI now represent 80+ major Mn companies, including 21 Chinese, ensuring a better coverage of this major market for the Mn industry.

Company	Country
Baosteel Resources Intl. Company Ltd.	China
Bosai Minerals Group Co. Ltd.	China
Bryah Resources Ltd.	Australia
Element 25 Limited	Australia
Euro Manganese Inc.	Canada
Guangxi Guikang New Materials	China
Guangxi Hourong Trading Company	China
Gulf Manganese	Indonesia
Inner Mongolia Puyuan	China
Inner Mongolia Ruihao New Material Technology Co. Ltd.	China
Keras Resources Plc.	United Kingdom
Linze Hongxin Mineral Industry Company	China
Mapple Rock Capital Partners Inc.	Canada
Minmet S.A.M	Monaco
Ningxia Jiyuan Metallurgical Group Co. Ltd	China
Pilbara Metals Group	Australia
Primeore Ltd.	Cyprus
S.K. Sarawagi & Co. Pvt. Ltd.	India
Shanghai Qunxian International Trade Co., Ltd	China
Sinosteel Resources Co. Ltd.	China
Tata Steel Ltd.	India
World Metals & Alloys (FZC), part of Oswal Group	UAE

More details on these companies are available [here](#) (for IMnI Members)

1 – Crude steel production

Global crude steel output expanded slightly in January to about 160 million mt, up by 1.9% from December and 6.1% higher than in January last year. Production increased in most regions except in Oceania.

- **China:** January 2020 production remained stable from the previous month according to Worldsteel, and it was 7% higher than in January last year (15% higher according to CRU data).
- **Rest of the world:** output in January rose by 4% from the previous month, driven by production growth in most regions, compensating the decreasing production in Oceania. However, the production was 3% lower from January last year, mainly due to 12% YoY decrease in EU output.

Crude Steel Production in January 2020

(in mln mt)	Jan-20	Dec-19	Jan-19	% Change MoM	% Change YoY	YTD 2020 Output	YTD 2019 Output	% Change YoY
Asia	116.2	115.8	105.7	0%	10%	116	106	10%
European Union (28)	12.3	10.9	14.0	13%	-12%	12	14	-12%
North America	10.2	9.8	10.4	4%	-1%	10	10	-1%
C.I.S.	8.5	8.2	8.6	3%	-1%	9	9	-1%
South America	3.3	3.1	3.7	8%	-11%	3	4	-11%
Other Europe	3.4	3.3	3.0	4%	14%	3	3	14%
Middle East	3.9	3.8	3.0	1%	29%	4	3	29%
Africa	1.2	1.0	1.4	13%	-17%	1	1	-17%
Oceania	0.5	0.5	0.5	-2%	-5%	0	1	-5%
World	159.5	156.6	150.4	1.9%	6.1%	160	150	6.1%

Source: World Steel Association, CRU, IMnI

2 – Silico-manganese (SiMn) production

Global SiMn production decreased by 5% in January, to around 1.36 million mt, due to production cuts in most regions except in the Americas.

- **Asia & Oceania:** production dropped by 6% MoM, mainly due to production cuts in China. Asia & Oceania now represent 85% of global output.
- **CIS:** output reduced by 1% MoM in the region, on account of the declining supply from Ukraine.
- **Europe:** supply decreased by 11% from the previous month, due to production cuts in Norway and France.
- **Americas:** production rose by 3% MoM, as production increase in Brazil and Mexico compensated decreasing supply from the USA.

SiMn Supply & Demand in January 2020

(in '000 mt)	Supply	MoM % Change in Supply	YoY % Change in Supply	Demand	MoM % Change in Demand	YoY % Change in Demand	Supply & Demand Balance
Asia & Oceania	1,161	-6%	-2%	1,133	-6%	-1%	29
C.I.S.	102	-1%	-21%	63	4%	5%	40
Europe	38	-11%	-21%	85	10%	-9%	-47
Americas	37	3%	16%	71	4%	-5%	-34
Africa & Middle East	21	-3%	-11%	28	4%	8%	-7
World	1,360	-5.1%	-4.5%	1,379	-3.7%	-1.5%	-20

Source: International Manganese Institute (IMnI)

3 – High-carbon ferro-Mn (HC FeMn) production

Global HC FeMn production contracted by 1.7% in January to 359,000 mt, because of output cuts in Asia and the CIS, but it was 1.6% higher than in January last year.

- **Asia & Oceania:** production fell in January, down by 4% from the previous month on decreasing supply from China and Malaysia.
- **Africa & Middle East:** output expanded by 7% driven by South Africa, compensating production cuts in Saudi Arabia.
- **CIS:** supply dropped by 3% in 2019 because of production cuts in Ukraine.
- **Europe:** output rose by 24% on increasing production in Norway.

HC FeMn Supply & Demand in January 2020

(in '000 mt)	Supply	MoM % Change in Supply	YoY % Change in Supply	Demand	MoM % Change in Demand	YoY % Change in Demand	Supply & Demand Balance
Asia & Oceania	278	-4%	1%	242	-4.7%	-1%	36
Africa & Middle East	26	7%	1%	22	4%	18%	5
C.I.S.	25	-3%	7%	18	4%	-6%	8
Europe	22	24%	27%	37	12%	-9%	-16
Americas	8	23%	-36%	35	5%	-4%	-27
World	359	-1.7%	1.6%	354	-1.3%	-1.7%	5

Source: International Manganese Institute (IMnI)

4 – Refined ferro-Mn (Ref FeMn) production

Global refined ferro-manganese production expanded in January from the previous month, by 8% to around 119,000 mt on rising supply from Europe, CIS, Americas and Africa which offset production cuts in Asia & Oceania.

- **Asia & Oceania:** supply contracted by 5% MoM in January, due to production cuts in Chinese plants during lunar new year holiday.
- **Europe & CIS:** output rose by 89% in January from the previous month, as increasing production in Norway compensated decreasing supply from Ukraine. However, it was 4% lower than the same period of last year.
- **Americas & Africa:** production in January was 2% higher than in the previous month. Increasing output from the USA offset production cuts in South Africa and Mexico.

Ref FeMn Supply & Demand in January 2020

(in '000 mt)	Supply	MoM % Change in Supply	YoY % Change in Supply	Demand	MoM % Change in Demand	YoY % Change in Demand	Supply & Demand Balance
Asia & Oceania	74	-5%	-4%	63	-5%	0%	10
Europe & CIS	27	89%	-4%	20	10%	-7%	7
Americas & Africa	19	2%	47%	32	4%	-2%	-13
World	119	8.1%	1.4%	115	-0.4%	-2.0%	5

Source: International Manganese Institute (IMnI)

5 – Manganese ore production

Global Mn ore supply contracted by 10% in January from the previous month, to 1.5 million mt Mn units, 19% lower than in January last year due to production cuts in all the regions outside the Americas.

- **Africa & Middle East:** supply fell by 13% MoM in January on production decreases in South Africa and Gabon. And it was 20% lower than in January last year with YoY declines in all the countries except Egypt and Namibia.
- **Asia & Oceania:** output contracted by 10% MoM in January, on decreasing production in Malaysia and China.
- **Americas:** production rose by 2% MoM in January because of increasing supply from Brazil and Mexico. And it was 11% higher than in January of the previous year.

Mn Ore Supply & Demand in January 2020

(in '000 net mt Mn units)	Supply	MoM % Change in Supply	YoY % Change in Supply	Demand	MoM % Change in Demand	YoY % Change in Demand	Supply & Demand Balance
Africa & Middle East	825	-13%	-20%	59	0%	10%	765
Asia & Oceania	386	-10%	-35%	1,311	-6%	-3%	-925
Americas	202	2%	11%	54	8%	0%	148
C.I.S.	107	-8%	49%	115	-1%	-17%	-8
Europe	1	-27%	-38%	79	20%	-7%	-77
World	1,520	-10.1%	-19.0%	1,617	-4.1%	-4.0%	-97

Source: International Manganese Institute (IMnI)

6 – Manganese metal production

Global manganese metal production decreased sharply by 16% in January, to 103,500 mt, almost 20% lower than in the same period of the previous year.

- **China:** EMM supply fell sharply by 17% in January to 96,000 mt, as many Chinese producers suspended production during lunar new year holiday. And most producers were unable to resume production after the holiday as planned because of the epidemic breakout.
- **ROW:** production increased by 1% in January from the previous month to 7,000 mt. However, it was 11% lower than in the same period of last year.

EMM Supply in January 2020

(in '000 mt)	Supply	MoM % Change in Supply	YoY % Change in Supply	Supply Same Period Last Year	% Change YoY
China	96	-17.3%	-20%	121	-20%
Rest of the World	7	1%	-11%	8	-11%
World	103.5	-16.3%	-19.8%	129.0	-19.8%

Source: International Manganese Institute (IMnI)

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succeed
in the Mn business

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