

Manganese:

Global industry markets & outlook

ARE YOU FACING BIG DECISIONS INVOLVING MANGANESE?

The market for manganese is global, and local events can make waves across the world. If you're involved with manganese in any way, you know that everything's important – both the small details and the big picture. A complete perspective is essential, whether you're preparing a company strategy, bringing new products to market, buying, selling or investing.

MAKE THE RIGHT CHOICE

Whatever your challenge, this report gives you deep insights to help you make well-informed recommendations or decisions. It's a detailed account of:

- World production and consumption
- Five year price forecasts
- End-use market applications
- Price trends
- International trade patterns
- The operations of the major producers

IS THIS REPORT FOR YOU?

Our clients include anyone with an interest in the evolving manganese market, anywhere in the world. Readers of past reports have come from a wide range of relevant industries – from extraction to end-use, from mines to factories to banks, from existing players to new entrants. And they range from analysts and researchers to operational managers and chief executives.

To order your report, visit www.roskill.com/manganese or call +44 20 8417 0087 now.

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WHAT READERS SAY

“When we review project or company opportunities, the most important area of review is the market place. We have always deferred to Roskill reports and their services for the prime benchmark reference point.”

Michael Kiernan,
Consolidated Minerals Limited

“Roskill has been a key reference to our industry for a long time...the best reference about the market and industries.”

Bayram AnKarali
Etimine SA, Turkey

“One of the few sources available for critical, detailed and reliable information on the industrial minerals markets.”

Emilio Lobato,
Technical Marketing Manager,
Magnesita Refratarios SA, Brazil

GET ACCURATE ANSWERS FROM INDEPENDENT EXPERTS

- What new manganese ferroalloy capacity is planned, and where is it to be located?
- Which new mining projects are coming on-stream or being developed?
- Are we likely to see an increase in the output of electrolytic manganese metal (EMM) in the coming years?
- How will continuing economic development in the emerging markets affect the use of manganese in steel?
- What is the outlook for manganese ore, metal and ferroalloys prices over the next five years?

WHY READERS CHOOSE ROSKILL

We're approachable. Our sources include a large network of industry contacts: the key players talk to us because we're approachable and because they know us well.

We're independent. The information and insights in “Manganese: Global industry markets & outlook” are completely independent. We're privately-owned and not beholden to anyone. Our expert researchers make a thorough and objective analysis of all available data, from sources across the globe.

We're expert. You want facts from people who know what they're talking about. Roskill's experts have been analysing the manganese industry for over 35 years and this is our 12th report on this sector.

Approachable. Independent. Expert.

That's why no other report can match the accuracy, depth and expertise of “Manganese: Global industry markets & outlook”.

WHAT ELSE CAN WE DO FOR YOU?

We also offer expert bespoke consultancy to help you tackle specific complex challenges, such as feasibility studies, market assessments or due diligence reports.

If you'd like to discuss a project, please email judith@roskill.co.uk or call +44 20 8417 0087.

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What's included?

Contents: 308 pages, 162 tables, 86 figures plus trade appendix

Overview

The on-going economic development in emerging markets, which has seen a large increase in steel production and consumption in recent years, will lead to manganese demand accelerating in the years to come. In particular, high grade manganese ores from Africa, Australia and South America will be required to feed the ferroalloy smelters of Asia, where ores are typically low-grade and unsuitable for production of good quality manganese ferroalloys.

While the future of the manganese industry will continue to depend on steel production, other applications are likely

to see impressive growth. Increasing use of Li-ion and NiMH batteries for consumer, electric vehicle and storage battery applications will see manganese consumption in this area rise to approximately 60kt by 2020.

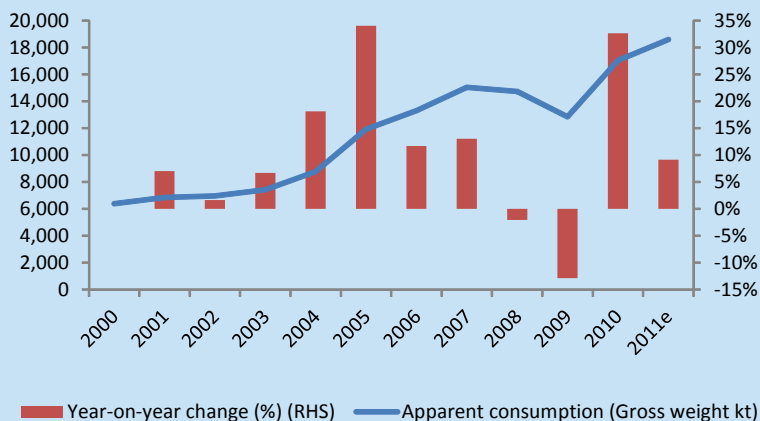
In response to rising demand, manganese production will increase in the coming years, having recovered from the market downturn in 2009. New capacity in traditional producing countries, such as South Africa, Australia and China will see output of manganese ore, ferroalloys and EMM rise in the coming years as new projects enter the

market to meet growing requirements.

Although supply is expected to increase in the coming years, power restrictions and industry restructuring will add some upward pressure to prices. Manganese ore prices are expected to remain stable, with some occasional spikes. Ferromanganese prices are likely to increase slightly faster than silicomanganese, reflecting faster expansion of the flat steel products market. Reflecting these conditions, manganese prices could be 20-30% higher in five years time from end-2011 levels.

This report gives you a full analysis of the key trends, issues and developments in the market, a clear insight into all areas of the industry and an authoritative analysis of its prospects.

World: Manganese ferroalloys apparent consumption, 2000-2011



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