



Metals Despatch

Newsletter of the International Metals Study Groups

June 2010, Issue No. 9

LEAD AND ZINC FORECAST

The outlook for World supply and demand for lead and zinc was presented during the ILZSG Spring 2010 meeting held in Lisbon on 28 April 2010. Highlights include:

- **The global usage of refined lead metal** is expected to increase by 7.3% to 9.31 million tonnes in 2010. In China, an increase of 9.1% in usage due to strong growth in the industrial battery sector and rising vehicle sales is anticipated in 2010. After declining by 17% in 2009 demand in Europe will increase by 3.2% in 2010. In the United States a rise of 2.8% is forecast for 2010, following a decrease of 6.3% last year.
- Global **lead mine production** is forecast to increase by 5.1% to 4.20 million tonnes in 2010 with increased production in Australia, China, India and Mexico.
- Global production of **refined lead metal** in 2010 is expected to increase by 7.5% to 9.41 million tonnes. This will be driven by the commissioning of new plants in Brazil and India and a return to normal production levels of a number of plants that were operating at reduced rates in 2009.

NEXT STUDY GROUPS' MEETING DATES

The dates for the next International Study Groups' meetings are:

ICSG: 28 September 2010, Antofagasta, Chile

INSG: 5-6 October 2010, Lisbon, Portugal

ILZSG: 7-8 October 2010, Lisbon, Portugal

Joint ILZSG/INSG Seminar 2:00 pm on 6 October 2010: "The Contribution of Metals to Our Sustainable Future" Lisbon

ICSG: Industry Advisory Panel, London, 14 October

- Global **zinc usage** is forecast to rise by 11.3% in 2010 to 12.05 million tonnes. After declining by 24.5% in 2009 demand in Europe is expected to rise by 21.6% this year. Usage in Japan, Southeast Asia and the United States is expected to recover from declines in 2009 as well. Chinese demand is expected to grow 8.9% due to infrastructure projects and auto sector growth.
- Global **zinc mine output** is forecast to increase to 12.05 million tonnes in 2010. This will be due to the reversal of some of the cutbacks and suspensions implemented in 2009 and opening of new capacity. Expansion of production is expected to be greatest in India and Mexico with smaller increases in Brazil, China, Finland, Peru and Russia.
- **Global refined zinc production** is forecast to rise 10.3% to 12.46 million tonnes in 2010, in part as a result of the restart of production closed or cut back in 2009. Adding to production will be a rise in output in China of 11.3% and the opening of a new refinery in India.
- The latest **forecasts** supplied by the Group's member countries indicate that global supply of refined zinc metal will exceed demand by 380,000 tonnes in 2009 and 227,000 tonnes in 2010.

For further details of the outcomes of the ILZSG meetings or questions on the market outlook please email Paul White at paul.white@ilzsg.org

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COPPER FORECAST

During the 35th Regular Meeting of the International Copper Study Group Statistical Committee in Lisbon on 29 - 30 April 2010 member countries reviewed the current outlook for trends in World supply and demand for copper during 2010 and 2011 and issued the following forecast:

- Global **refined copper usage** is forecast to decline by 1.5% in 2010 to 17.9 million tonnes (Mt) as apparent usage in China is expected to decline. World copper usage is expected to increase 5.1% in 2011 to 18.9 Mt.
- Global **copper mine output** is expected to rise 6.7% in 2010 to 16.8 Mt as capacity utilization rates are expected to improve and mine output is forecast to increase 3% in 2011 to 17.3 Mt.
- Global **refined copper metal production** in 2010 is predicted to increase by 0.6% to 18.5 Mt and expand 3.1% in 2011 to 19.1 Mt.
- ICSG anticipates that the **refined copper market balance** could show a surplus in 2010 of around 580,000 tonnes and that the surplus could decrease to around 240,000 tonnes in 2011.

For further details of the outcomes of the ICSG meetings or questions on the market outlook please e-mail ICSG Chief Statistician Ana Rebelo at rebelo@icsg.org

NICKEL FORECAST

The International Nickel Study Group (INSG) met on 26 and 27 April 2010 in Lisbon and reviewed the current outlook and trends in World nickel supply and demand. The following forecast was issued:

- Global **primary nickel usage** (consumption) was 1.29 Mt in 2008 and declined to 1.22 Mt in 2009. For 2010 a robust increase to 1.39Mt is expected.
- World **primary refined nickel production** was 1.38 Mt in 2008, and declined to 1.33 Mt in 2009. In 2010 production is anticipated to increase to 1.40 Mt. The 2010 figure does not include any adjustment factor for possible production disruptions.
- INSG members also discussed **market trends** and noted that, while world primary nickel usage in 2009 started off extremely weak, a recovery was evident in the second half of the year when stainless steel production improved in many markets. Nickel demand and usage accelerated in the first part of 2010, with stainless steel production increases experienced in most parts of the world. This resulted in higher primary nickel

prices and high demand for secondary nickel units, such as stainless steel scrap.

INSG recognizes that the current global economic crisis has eased from a year ago, but there is still a degree of uncertainty in the global market and its impacts on both the supply and demand for nickel are not fully known. The Study Group cautions that future market developments could alter the forward-looking market balance.

For further details of the outcomes of the INSG meetings or questions on the market outlook please email Sven Tollin at sven.tollin@insg.org

JOINT STUDY GROUPS' SEMINAR

A Joint Seminar on the topic of "New and Innovative Applications for Metals" was held on 28 April 2010 in Lisbon with the involvement of the International Lead and Zinc Study Group (ILZSG), the International Copper Study Group (ICSG) and the International Nickel Study Group (INSG),

The Seminar provided delegates with information on the wide range of new and sometimes unexpected uses for nonferrous metals. Mr Tony Lea of the International Copper Association gave a presentation on the antimicrobial properties of copper and the benefits of copper touch surfaces. Mr. Katsuhiko Masuda, Managing Director of the Japan Mining Industry Association, spoke about the wide range of new applications for copper including lead-free brass plumbing, copper alloy fish cages, touch surface uses, next generation heat exchangers and high tech copper wires.

In a presentation on innovation in stainless steel, Mr. Pascal Payet-Gaspard, Secretary General of the International Stainless Steel Forum (ISSF), elaborated on stainless steel in fire resistance, earthquake damage mitigation, water cycle improvements and green energy production. Curtis Stewart of INSG gave a presentation on new and innovative uses of nickel citing applications in transportation of LNG, concentrated solar power, offshore platforms, new types of batteries and nanotechnology.

Mr. David Wilson, Executive Director of the International Lead Association, noted the range of innovative uses of lead, including hybrid vehicles, renewable energy power storage, lead cooled nuclear reactors and liquid metal magneto hydrodynamics.

Speaking for the zinc industry, the Executive Director of IZA, Mr. Stephen Wilkinson spoke on the critical role of zinc for child survival, growth and development and provided information on the joint IZA-UNICEF program 'Zinc Saves Kids'. Other innovative uses of zinc including Zinc Energy Storage

Technology (ZEST) and zinc-air batteries were mentioned as well.

Mr. Renzo Tomellini, Head of Unit at DG Research, European Commission spoke on the Commission's programs to promote innovation. The 7th EU Framework Programme for Research solicits calls for research proposals. The EU Raw Materials Initiative also touches on innovation as it promotes recycling, the use of secondary raw materials and research.

The Seminar concluded with a panel discussion by industry associations and government representatives. Among the points stressed were the important role governmental financial incentives play in innovation, the significance of intellectual property protection, the role of innovation in supporting global trends such as energy efficiency and sustainability, and the fact that metals can both substitute and complement other metals. Potential areas for further Study Group work identified included research on battery systems, energy-related issues, new automobiles and vehicles and nanotechnology.

For further details about work underway in the Study Groups please email paul_white@ilzsg.org (for lead and zinc), curtis_stewart@ilzsg.org (for nickel) and pickard@icsg.org (for copper). The presentations given at the Seminar may be viewed by visiting: <http://www.ilzsg.org/presentations.asp>

INSG MEETING 26-27 APRIL 2010

Delegates from INSG member countries, industry and observing countries/organisations met in Lisbon 26-27 April to review statistical, economic and environmental issues related to nickel.

Delegates reviewed the INSG primary nickel market statistics in detail, and discussed the market forecast, which was prepared by the secretariat based on information provided by governments and industry. Details of the forecasts are provided above.

The INSG Environmental and Economic Committee received presentations on topics related to environmental regulation and international policy initiatives that may affect nickel. Mr Bruce Wedderburn, Principal at Malachite Process Consulting, presented a report on the use of heap leaching in the production of nickel. This study had been commissioned by INSG. Dr. Nicole Kinsman, Technical Director, International Molybdenum Association, spoke on the use of stainless steel in architecture. Mr. Rafael Sanchez of Acerinox, Spain, spoke on the "Use of Stainless Steel in Solar Energy Projects in Spain". Mr. Rouben Indjikian, Deputy Head of the UNCTAD Special Unit on Commodities, spoke on the Global Commodities Forum, a new initiative by UNCTAD.

The Statistics Committee, in addition to reviewing the latest statistical data, also received valuable input to its work through a series of presentations and discussions. Mr. Makoto Inaba of Sumitomo Corporation presented an overview of the Ambatovy Nickel Project in Madagascar. A presentation on the latest developments in the world stainless steel markets was provided by Mr. Peter Kaumanns, ISSF, and delivered by the secretariat.

The INSG Industry Advisory Panel, comprised of representatives from the world's nickel producing, consuming and recycling industries, once again provided valuable input on the Study Group's work program priorities. The Panel heard presentations from: Ms. Vanessa Davidson of CRU, who discussed the supply and demand situation, Mr. Benno Kratz from ELG, Germany, who spoke on global trends in the stainless steel scrap market from the point of view of a large processor, and Mr. Heinz H Pariser who made a presentation on "World Stainless Steel Scrap".

Copies of the presentations are available on the INSG website www.insg.org

ILZSG SPRING MEETING, LISBON 2010

The International Lead and Zinc Study Group held its Spring meeting in Lisbon on 28 April 2010. Delegates were presented with a review of the current outlook for World supply and demand for 2010 at the meeting of the ILZSG Statistical and Forecasting Committee (See details on page 1). Meetings of the Standing Committee, Economic and Environment Committee and the ILZSG Industry Advisory Panel were held.

The Industry Advisory Panel met on 28 April and provided an opportunity for members to comment on the latest developments in the lead and zinc market. Presentations were made by Mr Doug Panagapko, Senior Commodity Analyst, Natural Resources Canada on "Infrastructure Challenges Related to Undeveloped Lead-Zinc Deposits in Northern Canada" and by Dr. Patrick Moseley, President, Advanced Lead Acid Battery Consortium, who spoke on "The Latest Developments in Lead-Acid Battery Technology". Copies of these presentations are available on the ILZSG website.

The Study Group's Economic and Environment Committee met on 28 April. Mr. Brian Wilson of the International Lead Management Center spoke about the work being done with CFC funding to promote the environmentally sound recycling of ULAB in Senegal. Dr. Frank van Assche, Director of European Affairs for the International Zinc Association, gave an overview of the environmental challenges facing the zinc industry. The Portuguese Ministry of Economy and Innovation provided a report on preparations for the mine-related meetings of the UN Commission on Sustainable Development. Copies of the presentations are available on the ILZSG website.

ICSG CONVENES 35th REGULAR MEETING

Over 50 representatives from ICSG member governments and companies, observer governments and organizations attended the International Copper Study Group's 35th Regular Meeting at ICSG Headquarters in Lisbon on 29-30 April 2010.

Meetings were held of the Environmental and Economic Committee (EEC), Statistical Committee, Industry Advisory Panel, Finance Committee and Standing Committee, followed by a Plenary Session. At the EEC meeting the Committee was provided with three presentations related to copper scrap: ICSG Economist Mr Joseph Pickard presented the outcomes of the 2010 ICSG Annual Recyclables Survey; Mr Marc Gascon of Spanish semi-fabricating company La Farga Lacambra delivered a presentation on the current situation in the European scrap market; and ICSG Head of Economics and Environment Mr Carlos Risopatron presented the draft final report of the Copper Scrap Project and recommendations for future work. Mr Risopatron also presented a report on the update of the semis capacity database in China under development with BGRIMM and an update of work on the database of copper and copper alloy semi-fabricators (ex-Asia) contracted with US firm Nathan Inc. Members approved proposals to continue to improve ICSG information on semis in China, India and the rest of the world and to develop a global copper flow model. Members were also provided with an update of advances on the project on leading economic indicators of copper use and other selected topics.

At the Statistical Committee meeting, ICSG Chief Statistician Ms Ana Rebelo delivered presentations on the current state of the global copper market, the impact of the onset of the economic crisis on both usage and production, the net change in the global copper production/usage since the (pre-crisis) April 2008 forecast, and the ICSG copper production and usage forecast for 2010/2011. Ms Wang Ye of BGRIMM and Mr Nicholas Snowden of Barclays Capital delivered presentations on China's copper usage growth in 2009 and the potential for unreported stocks. Members were also provided with presentations on the copper industries in Brazil and Peru, as well as a presentation on the latest developments in world copper mine and refinery capacity. Presentations may be viewed at ICSG's web site www.icsg.org

ICSG AT COPPER 2010 CONFERENCE

ICSG Head of Economics and Environment, Carlos Risopatron, delivered a presentation entitled "Global Copper Market Drivers 2010-2015" at the Copper 2010 Conference in Hamburg, Germany in June 2010. For more information, please contact the ICSG Secretariat at risopatron@icsg.org

ICSG PRESENTS AT EUROPEAN SULPHURIC ACID ASSOCIATION MEETING

The ICSG Chief Statistician, Ana Rebelo, delivered a presentation entitled the "Copper Industry Trends: Mines and Smelters Projects" at the European Sulphuric Acid

Association meeting (Spring 2010 General Assembly) in Lisbon, Portugal, in June 2010. For more information, please contact the ICSG Secretariat at rebelo@icsg.org

ILZSG PARTICIPATION IN ZINC COLLEGE

The ILZSG Head of Forecasting and Statistics, Paul White, took part in the International Zinc Association's Zinc College held at Trail, British Columbia, on 16-21 May 2010. He presented a paper entitled 'Zinc Industry Fundamentals – An Overview and Analysis'. For copies of the paper, please contact the ILZSG Secretariat at paul.white@ilzsg.org

ILZSG PRESENTS AT 'ZINC AND ITS MARKETS' SEMINAR

The ILZSG Head of Forecasting and Statistics, Paul White, presented a paper entitled 'Is Zinc Demand on the Road to Recovery?' at the 14th Zinc and Its Markets Seminar held on 4-6 May 2010 in Bergen, Norway and sponsored by Metal Bulletin. For copies of the paper, please contact the ILZSG Secretariat at paul.white@ilzsg.org

INSG AUTHORS ARTICLE FOR MINING JOURNAL

INSG staff collaborated in writing an article on the world nickel market in 2009 and the outlook for 2010. The article was published in the 18 June edition of Mining Journal under the title 'The Nickel Seesaw'. The secretariat will distribute copies to all INSG member country delegations.

Forthcoming Events

MEETINGS, CONFERENCES and SEMINARS

- **Bicentennial Mining Week Events in Antofagasta, Chile.** As part of a Republic of Chile Bicentennial Mining Week in Antofagasta, Chile from 27 September to 1 October, the next ICSG meeting will be held in Antofagasta on 28 September 2010. CESCO, the Chilean mining industry study/research organization, plans to hold mine visits, a major industry dinner and other events in Antofagasta during the week beginning 27 September and the Chilean Copper Commission (COCHILCO) will hold its annual international seminar on 29 September. Further information is available at www.icsg.org
- **UNSCD Meetings.** The UN Commission on Sustainable Development (UNSCD) will meet in New York in May 2011 as the second part of the two year cycle (2010 and 2011) to formulate policy recommendations on mining, chemicals and waste management. For further information see: (<http://www.un.org/esa/sustdev/natlinfo/natlinfo.htm>)
- **The 12th European Lead Battery Conference,** organized by the International Lead Association (ILA), will be held in Istanbul, Turkey 21-24 September 2010. More information can be found at www.ila-lead.org
- **Zinc Diecasting 2010 – Design for the Future,** Vienna, Austria, 23-24 September 2010. Organized by the International Zinc Association. More information can be found at www.iza.com
- **The 8th Asia Pacific General Galvanizing Conference 2010,** Taipei, Taiwan, 21-24 November. The sessions will focus on the theme of “General Galvanizing & Sustainable Development of Resource”. Organized by the International Zinc Association. For more information visit www.iza.com



PUBLICATIONS

*****AVAILABLE NOW*****

NEW

China Lead Acid Battery Market

This detailed study, prepared for ILZSG by the Beijing General Research Institute of Mining and Metallurgy (BGRIMM) provides an overview of current production and usage of lead-acid batteries in China together with a summary of likely rates of growth over the period 2009 to 2014. Much of the information contained in the report has been sourced directly from battery manufacturers, e-bikes producers and experts in renewable energy. 60 pages. *Published June 2010.*

NEW

China Zinc Recycling Industry

Prepared for ILZSG by the Beijing General Research Institute of Mining and Metallurgy (BGRIMM), this report provides a comprehensive assessment of the volume of zinc recovered from scrap in China. It also provides information regarding the main sources of secondary zinc material and likely future trends. Much of the data contained in the report has been sourced directly from zinc producers, consumers, traders and scrap dealers. 44 pages. *Published June 2010.*

NEW

INSG Environment, Health and Safety (EHS) Regulations Relating to Nickel 2010

An updated compilation of environmental, health and safety regulations affecting nickel. The listing of regulations is provided by country, state or province as well as separately for international organizations. The report is presented in a spreadsheet format and contains web links to regulations in various jurisdictions. 42 pages. *Published June 2010.*

NEW

ILZSG Lead & Zinc New Mine & Smelter Projects Mines 2010

A principal source of information on developments in the lead and zinc industries for 45 years. This 85 page report contains comprehensive data gathered from ILZSG's extensive network of sources worldwide. In total, over 200 entries from 51 countries are listed. The report includes extensive details of new projects in China. *Published in January 2010.*

NEW

ILZSG World Directory: Continuous Galvanizing Lines 2010

A full listing of continuous galvanizing lines with information from 62 countries. The Directory includes data on plant locations, annual capacities, annual zinc consumption and contact information. 95 pages. *Published in January 2010.*

Copper Scrap Market in Japan, China's Scrap Usage Survey and Domestic Copper Scrap Generation in China, 2010-2015

Adding to ICSG's expanding body of research on scrap, ICSG recently commissioned three reports about scrap that provide new information on two critical copper markets: Japan and China. The Japanese Report, prepared by MERI/J, provides a comprehensive overview of the Japanese refined copper and copper scrap markets and also covers Japanese copper scrap trade, material flows, how scrap is categorized

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and relevant regulations. The Chinese Reports, prepared by BGRIMM, respectively give better insight into scrap usage in China at the smelters/refineries and fabricators and forecast domestic scrap generation in China. *Published October 2009.*

Framework for Analyzing the Impacts of Investment Legislation and Tax Regimes on Copper Supply Coming On Stream

As part of ICSG's efforts to better understand the opportunities and challenges facing the copper industry, mineral economist Mr James Otto was commissioned to produce this report that examines how national regulatory and fiscal systems impact copper supply coming on stream. *Published October 2009.*

INSG World Directory of Nickel Production Facilities

Comprehensive directory lists nickel mines, smelters and refineries as well as new nickel industry developments (committed, likely and potential) together with recent closures in more than twenty countries. *Published October 2009.*

INSG Market for Nickel: Fundamentals Driving Change 2009

Comprehensive analysis of the drivers for change in the world nickel market. Analyses the structure of mine and refined world nickel production and identifies current and future trends. Assesses nickel usage patterns in the main market sectors. Traces changes in the structure of industry ownership. The 2009 edition updates the original report of 2008. *Published September 2009.*

ICSG 2009 Statistical Yearbook

The ICSG Copper Bulletin yearbook includes annual statistics on copper and copper products, their production, usage and trade by country, as well as stocks and exchange prices, providing a global view of supply and demand for the past 10 years. The Yearbook serves as a useful tool for consultations and analysis on the longer term evolution of world copper production, usage, stocks and prices. Subscribers to the Copper Bulletin receive the Yearbook as part of their annual subscription. *Published July 2009.*

INSG Nickel in Batteries 2009

A comprehensive report on the use of nickel in batteries drawing on data from a variety of sources, both government and private. Provides a history of nickel in batteries and describes the principal types of batteries which use nickel. A comparison of the various nickel containing batteries in terms of cost and energy density is provided, as is information on the environmental regulations impacting nickel batteries. Includes a list of major producers of nickel containing batteries with web addresses. 25 Pages. *Published May 2009.*



MORE PUBLICATIONS

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ICSG Directory of Copper Mines and Plants

The Directory of Copper Mines and Plants highlights current capacity and provides a five year outlook of forecast capacity for over 1,000 existing and planned copper mines, plants and refineries on a country by country basis, including separate tables for SX-EW plants. Salient details for each operation are included and the Directory separates operations between Operating & Developing and Exploration & Feasibility stages. Last published in January 2010, the next update is *scheduled for publication in July 2010*.

Final Report of the ICSG Copper Scrap Project

Synthesizing the findings of an ICSG research project on the copper and copper alloy scrap markets that was approved by ICSG members and initiated in October 2007, this report presents a comprehensive picture of the global copper scrap market and its determinants. *To be published in August 2010*.

Directory of Copper & Copper Alloy Fabricators (First Use) 2010 Edition

This directory provides a systematic global overview of companies and plants involved in the first use of copper. First users are mainly semis fabricators that process refinery shapes into semi-finished copper and copper alloy products. The Directory covers wire rod plants, ingot makers (for castings), master alloy plants, brass mills, and electrodeposited copper foil mills. *To be published in September 2010*.

ICSG 2010 Statistical Yearbook

The ICSG Copper Bulletin yearbook includes annual statistics on copper and copper products, their production, usage and trade by country, as well as stocks and exchange prices, providing a global view of supply and demand for the past 10 years. The Yearbook serves as a useful tool for consultations and analysis on the longer term evolution of world copper production, usage, stocks and prices. *To be published in July 2010*.

To place an order or for further information about the above and other publications published by the International Metals Study Groups please contact: sales@ilzsg.org for ILZSG reports, mail@icsg.org for ICSG reports, and insg@insg.org for INSG reports.