

# **INSG 18<sup>th</sup> General Session**

**Lisbon, April 2008**

International Chromium Development Association



## **Agenda**

- What is Chrome ?**
- Comparison Nickel vs. Chrome**
- Introduction of ICDA**

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- What is Chrome ?
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## CHROMIUM

Unique  
Essential  
Sustainable  
Passive  
Tenacious  
Self-Renewing

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**CHROMIUM**

**is  
necessary to produce  
Stainless Steel**

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## **Agenda**

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## General:

### Nickel

### Chrome

Customers are stainless steel producers

- LME commodity

free traded

- LME stocks

producer stocks

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## Usage:

### Nickel

### Chrome

Units per standard 304 grade:

8 %

18 %

Units per ferritic 400 grade:

0 %

18 %

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Products:

Nickel

- Metal / LME material
- Ferro nickel
- Nickel in scrap

Chrome

- Chrome metal
- Ferro Chrome
- Chrome in scrap

Products:

Nickel

- Metal / LME material
- Ferro nickel
- Nickel in scrap

Chrome

- Chrome metal
- Ferro Chrome
- Chrome in scrap

focus on

Production output 2007 in '000 to:

<u>Nickel</u>		<u>Chrome</u>
- 1,433		7,745
- 14 %	Europe	5 %
- 21 %	CIS	17 %
- 4 %	Africa	48 %
- 16 %	China	17 %
- 20 %	America	2 %
- 25 %	others	11 %

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Dominated by Africa

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## Pricing:

Nickel

Chrome

Contract price

Spot price

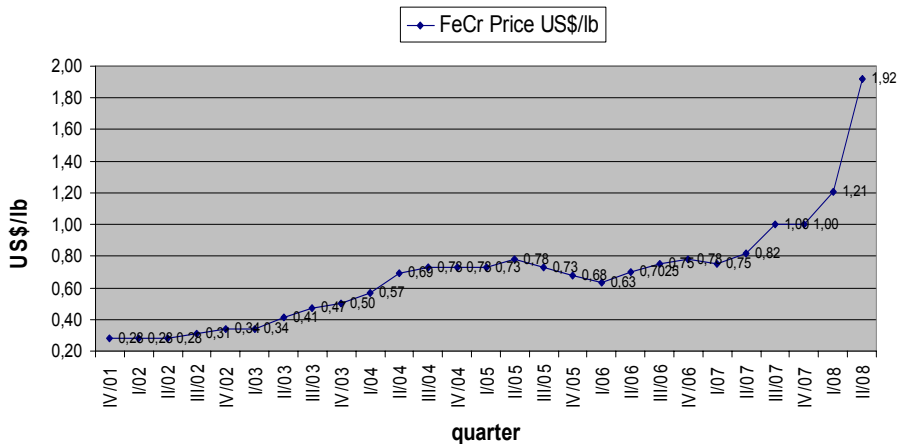
- Daily LME based base

Quarterly price

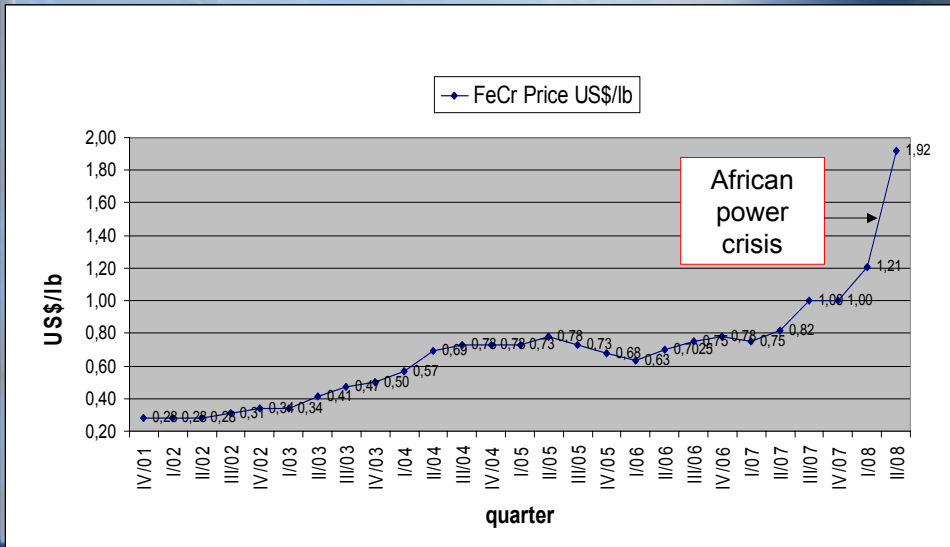
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## Pricing:



## Pricing:



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## The ICDA

- ✓ 96 Members
- ✓ 21 Countries
- ✓ 5 Continents

Africa	16
America	7
Asia & Middle East	33
Australasia	1
Europe	39

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## The ICDA

Established 1990

*Merger of Chromium Association (Paris) and Chromium Centre (Johannesburg)*

Based in Paris

Council Members by Region/Sector: 19

Permanent Staff: 3

Standing Committees: *HSE + Market Development + Management*  
*+ Market Intelligence*

**The only body for Chromium in all its forms**

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## The ICDA

✓ **55 Ordinary Members** representing:

- 93% of Chromite Ore
- 82% of Ferrochromium
- 82% of Chromium Chemicals
- 60% of Chromium Metal
- 60% of Stainless Steel

The Single Voice of The Chromium Industry

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## The ICDA

✓ **31 Associate and 10 Affiliate Members:**

- ✓ Trading
- ✓ End-Users
- ✓ Service Providers

An Extended Partnership

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## The ICDA

- ✓ The Strategic Issues:
  - ✓ Health and Environment
  - ✓ Market Intelligence
  - ✓ Market Defence/Development

A focus on reality

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## The ICDA

Manifests active concern on the impact of:

- ✓ Processes
- ✓ Products
- ✓ Services

Insists on:

- ✓ Regulatory compliance
- ✓ Responsible : Production  
Use  
Product Disposal

The vehicle for sound industry performance

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## The ICDA

Provides:

- ✓ A Watching brief on regulatory issues
- ✓ Consistent responses to specific HSE issues
- ✓ Hazard and risk management information
- ✓ Reviews of available data by independent institutions

Sharing scientific and technical resources

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## The ICDA

Collects and disseminates:

- ✓ Production data
- ✓ Trade movements
- ✓ Latest industry news

THE source of reliable market intelligence on  
Chromium

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## The ICDA

Defends and protects existing markets

Assists growth in emerging markets by:

- ✓ Setting up active partnerships
- ✓ Cooperating in selected projects
- ✓ Improving networking

A singular approach to the effective use of scarce resources

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## The ICDA

On all strategic issues, a cooperative approach is the preferred option, hence:

- ✓ The Team Stainless initiative
- ✓ Joint HSE action and projects
- ✓ Cooperation on statistics/economics

The way forward

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## The ICDA

Organises annual events for the industry

- ✓ Prominent speakers
- ✓ Global industry overviews
- ✓ Profiles of national industries
- ✓ Industry-wide exchange

▶ The Who's who of Chromium

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## You are cordially invited to attend

### CHROMIUM 2008

*THE Open Conference for Industry-wide co-operation and exchange*

New Delhi, 2<sup>nd</sup>-6<sup>th</sup> December 2008

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# Thank You

*You are always welcome at [www.icdachromium.com](http://www.icdachromium.com)*

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