



INTERNATIONAL NICKEL STUDY GROUP

2018

Member Countries



INTRODUCTION

The International Nickel Study Group (INSG) is an autonomous intergovernmental commodity organization established in 1990. INSG is the sole multi-lateral institution dedicated to issues affecting nickel production, usage and trade. Its activities, projects and publications cover a wide range of topics, focusing on market transparency, market access and sustainable development. Its headquarters are located in Lisbon, Portugal.

MEMBERSHIP

Membership is open to any country involved in nickel production, usage or international trade. Current members are Australia, Brazil, Cuba, European Union, Finland, France, Germany, Greece, Italy, Japan, Norway, Portugal, Russian Federation, Sweden and the United Kingdom.

MANDATE

Promote international cooperation: the mandate of the Study Group is to promote enhanced co-operation on issues related to nickel and a forum in which governmental consultations on nickel can be held.

Provide a global forum: the Study Group provides a forum for all market participants, both producers and consumers, to examine their common problems and carry out open dialogue and free exchange of information.

Increase market transparency: greater market transparency is an important goal of the Group through comprehensive, reliable and up-to-date statistics, as well as through special investigations, research and studies.

INSG endeavours to provide its members, as well as industry and general public, with accurate and timely information on capacities, production, usage, trade, stocks, prices, technologies, research development and in other areas that may influence the supply and demand for nickel.

To conduct consultations and exchanges of information on the international nickel economy; to improve statistics on nickel; to increase market transparency; to undertake studies on issues related to nickel; to consider special problems or difficulties that exist or may arise in the international nickel economy.

Currently, INSG provides a mechanism to assess the supply/demand balance based on reliable information and the expertise of INSG staff as well as government and industry advisors.

Since 2006, the International Copper Study Group and International Lead and Zinc Study Group have been co-located with INSG in Lisbon, Portugal.

INSG October 2018 Meetings

The next meetings of the Group will be held in the period 1-3 October 2018. The INSG meetings provide a unique opportunity for nickel industry people from all parts of the upstream and downstream nickel industries to meet together and to interact with government representatives from around the world. Agendas for the October 2018 meeting will include the following topics among others: world market forecast, development of future supply and prospects for world usage, new developments in legislation related to environmental issues.

A Joint Study Groups' Seminar on "Base Metals in India – the Next Super-Cycle?" will be held on 3 October (with the International Lead and Zinc Study Group and the International Copper Study Group). The Seminar presents excellent opportunities for representatives from all the metals sectors to interact.

For more information please visit our website www.insg.org or send an email to insg@insg.org

INSG's Statistics, Directories, Reports, Insights

INSG Monthly Nickel Statistical Bulletin and Statistics Yearbook

The Bulletin comprises 12 monthly issues with the latest available data covering about 25 months plus annual data for the most recent two to eleven years. A Yearbook is published once a year usually in November and contains annual data for the latest 11-year period. Bulletin published monthly, the Yearbook annually.

World Directory of Nickel Production Facilities (updated annually)

This 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.

Report on the Use of Nickel in Batteries 2018

The report covers the use of nickel in the various types of batteries. Nickel up to now is the most widely-used material after lead in off-grid energy storage batteries. The report contains following essential information:

- A) Historical & status quo of nickel usage in batteries and the prospective outlook
- B) Specific nickel chemicals applicable for batteries and their availability
- C) Advantage and disadvantage when competing with other alternative materials in perspective of material availability, cost, technology maturity, irreclaimability, environment impact, etc.
- D) Analysis of battery using industries, historical data, current situation and prospects by industries, by region, specifically by growth potential
- E) Information on nickel usage breakdown and trend, with focus on types and quantities of nickel used in different types of batteries
- F) Discussion of changes in technology and methods that may change demand
- G) Information on major nickel-containing battery producers and information on existing production, proposed new production, expansion plans, etc.
- H) The regulatory framework governing battery industry, including but not limited to EU regulations on Restriction of Hazardous Substances and End of Life Vehicles and U.S. EPA regulations
- I) Analysis of recycling of nickel-containing batteries from the perspective of technology, economic value and market size
- J) Analysis on potential fields for secondary uses of batteries. There are second life applications of batteries (in more stationary settings) once their actual use has come to an end, analysis on this new underdeveloped market would be ideal.

World Nickel-based Alloys 2016

This report was commissioned by INSG to provide a comprehensive overview of the World Nickel-based Alloys market.

Nickel Production in South East Asia: Trends and Perspectives 2016

This report was commissioned by INSG to provide a comprehensive overview of primary nickel production in South East Asia. Nickel reserves and mine production, with company details, are provided for nickel production in Indonesia, Philippines, Myanmar, Vietnam, Papua New Guinea and Solomon Islands.

INSG Environment, Health and Safety (EHS) Regulations Relating to Nickel 2015

A 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 with web links to regulations in various jurisdictions.

Please visit www.insg.org for more reports and publications with detailed brochure for each.

Joint Study Groups' Report

Joint Project on Mining and Smelting/Refining Waste 2018

The report addresses volume and type of mining, smelting/refining waste, risks associated with the waste, case studies of failure and success in managing the waste and its impact on miners and the communities, characteristics & property of the waste and its potential economic value, prevailing technical process and innovation in treating waste, economic & cost analysis of treating waste and recovering value addition, regulation, law and administrative measures/legislation related with waste management and their impact on the industry. The following five general areas are addressed in detail: 1) generation and identification, 2), technical and risk analysis, 3) technological process and innovation, 4) economic and cost analysis, 5) regulation, law and legislation.

Social Acceptance of Mining 2016

This report has been prepared by the University of Queensland-based Centre for Social Responsibility in Mining on behalf the Metals Study Groups – the International Lead and Zinc Study Group, International Copper Study Group and International Nickel Study Group. The report is intended for all stakeholders with an interest in social acceptance and social responsibility in the mining and metals sector.

The By-Products of Lead, Zinc, Copper and Nickel - 2015

A joint report of the three Study Groups on the production, usage, trade and outlook for 17 by-products metals. Information on common sources of by-product metals, refinery processes, recycling, markets, contracts, historic process and pricing mechanisms, uses, government regulations, REACH status of compounds, government stockpiles and trade restrictions is provided. Historic market balances for many of the metals are provided. A Directory of mining and producing companies with capacities is also included. Metals covered are arsenic, bismuth, cadmium, cobalt, gallium, germanium, gold, indium, mercury, molybdenum, platinum group metals, scandium, silver, rhenium, selenium, tellurium and rare earths.

Cobalt as a By-Product of Copper and Nickel

A joint report of the International Nickel Study Group and the International Copper Study Group which provides improved information on cobalt, and the relationship between nickel, copper and cobalt production, refining and use. This 85-page report furnishes data on production and usage through 2012 as well as an outlook for cobalt mine capacity and production for the period 2012 to 2018. Information on end-of-life recycling rates for cobalt-bearing products is also included.

Report on Taxation and Fiscal Incentives of Copper, Zinc, Lead and Nickel

A joint report of the ILZSG, INSG and ICSG providing an in-depth analysis of taxation and fiscal incentives applied to non-ferrous metals in the major mining and metals producing countries. The research was carried out by Raw Materials Group (RMG) of Sweden on behalf of the Study Groups and is intended to be a valuable reference document for governments and companies.

INSG Insights

Recent INSG Insights which are available free of charge on our website include:

- An Overview of World Stainless Scrap Trade updated to 2016
- Stainless Steel in Food Preparation
- Nickel in Latin America
- Conflict Minerals
- New IMO Regulations Impacting on Shipping Ores and Concentrates
- Nickel in Emerging Technologies

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International Nickel Study Group

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* Member Countries: Australia, Brazil, Cuba, Finland, France, Germany, Greece, Italy, Japan, Norway, Portugal, Russian Federation, Sweden, United Kingdom.