



# INTERNATIONAL NICKEL STUDY GROUP

2020

## Member Countries



## INSG: Overview, Mandate and Functions

### 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 Meetings 2020

The next meetings of the Group will be held in the period 12-14 October 2020. 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 meetings 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 "Latest Developments Regarding the Exploitation and Mapping of Base Metal Reserves and Resources" will be held on 15 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](http://www.insg.org) or send an email to [insg@insg.org](mailto: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 Nickel Production and Usage in Indonesia 2020

This 56-page report was commissioned by INSG in order to obtain improved information on the production and usage of nickel in Indonesia. It is part of on-going efforts by INSG to provide member governments and industry with a better understanding of the issues driving the nickel market

- A) Provides an overview of nickel resources and reserves in Indonesia by producer
- B) Describes current and future nickel producers and their facilities
- C) Analyses the main trends regarding trade flows
- D) Lists current and future stainless steels producers
- E) Statistics and analysis cover the period from 2015 to 2022
- F) Enhances understanding of the main mining laws and trade policies affecting the Indonesian nickel industry

### 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.

Please visit [www.insg.org](http://www.insg.org) for more reports and publications with detailed brochure for each.

## Joint Study Groups' Reports

### Joint Study on Current Responsible Sourcing Initiatives along Minerals and Metals Supply Chains 2019

The Joint Study is a stocktaking process of current legislation, regulation, initiative and corporate practices related to responsible sourcing of minerals and metals. Similarities and unique characteristics of each legislation, regulations, initiatives, standards and approaches can be found and used as reference. Due to the close correlations and overlaps between responsible sourcing, corporate social responsibility and code of conduct, the report also categorizes the responsible sourcing into responsible mining, responsible transportation, responsible trade, responsible processing and responsible allocation of economic benefits.

### Solid Wastes in Base Metal Mining, Smelting and Refining - 2019

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.

### 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.

### 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.

## INSG Insights

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

- An Overview of World Stainless Scrap Trade in 2017 and 2018
- 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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**Mr. Francisco Pinto**

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**Ms. Inês Lopes**

Administrative Officer

## Contact

**International Nickel Study Group**

**Rua Almirante Barroso 38 - 5**

1000-013 Lisbon, Portugal

**Tel:** +351 213 567 030

**Email:** [insg@insg.org](mailto:insg@insg.org)

**Web:** [www.insg.org](http://www.insg.org)



# International Nickel Study Group

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<i>World Directory of Nickel Production Facilities 2020</i>	2000	3000	
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<i>Nickel Pig Iron Study 2012</i>	150	300	
<i>Nickel Pig Iron Study 2012 (with statistical attachments)</i>	200	400	
<i>Nickel Heap Leaching Study 2010</i>	100	200	
<b>JOINT REPORTS</b>			
<i>Joint Report on Solid Wastes in Base Metal Mining, Smelting and Refining: A Comprehensive Study for the Copper, Lead, Zinc and Nickel Industries 2019</i>	500	1000	
<i>Joint Study on Current Responsible Sourcing Initiatives along Minerals and Metals Supply Chains 2019</i>	500	1000	
<i>Social Acceptance of Mining 2016</i>	500	750	
<i>Joint Report on By-Product Metals of Copper, Lead, Zinc &amp; Nickel 2015</i>	1000	1500	
<i>Cobalt as a By-Product of Copper and Nickel (2014)</i>	1000	2000	
<i>Taxation, Royalties and Other Fiscal Measures Applied to the Non-Ferrous Metals Industry (2013)</i>	375	750	
<b>ENVIRONMENT</b>			
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International Nickel Study Group, 38 Rua Almirante Barroso, 5th Floor, Lisbon 1000-013, Portugal

Tel: +351 21 356 70 30 Fax: +351 21 359 24 29 E-Mail: [insg@insg.org](mailto:insg@insg.org)

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