

CENTRAL AFRICAN CASSITERITE ALMOST ENTIRELY CONFLICT-FREE IN FIRST HALF OF 2014

Following a statistical review of all data available to ITRI on cassiterite trade, we are extremely pleased to announce that almost all tin mineral exports from the central African region during the first half of 2014 were traded within the iTSCi Programme; traceable, conflict-free and by member companies following the recommendations of the OECD guidance on due diligence for responsible mineral trade.

Our analysis involves comparison of official exports from the main producing countries of DRC and Rwanda, iTSCi export tonnages, and imports into the leading purchasing countries reported to be from a wider range of central African countries i.e. including Tanzania or other adjoining countries. The detailed figures are shown in the table below. Figures from the newer iTSCi country of Burundi will also contribute to the analysis in the second half of 2014.

A remarkable figure of approximately **99% coverage** by iTSCi in first half 2014 is reached both by comparison with official exports from the region, and with reported imports to important international treatment/smelter countries. This percentage is expected to remain similar when full year data becomes available.

This achievement has been possible with the continued commitment and co-operation of the Governments and local authorities of the region, private sector iTSCi member companies locally and worldwide, miners and their communities and other stakeholders who participate in risk mitigation discussions. The exceptional dedication of all our partners managing and implementing the iTSCi Programme has also been a key contributor to this success.

It is notable that official export figures reported by both DRC and Rwanda are now accounting for the vast majority of tin concentrates actually shipped. This is a particular improvement on the situation only a few years ago when imports into receiving countries were reported to be significantly higher than official exports. In fact, this trend could almost reverse, with some indication that the exports figures are now more reliable than the import figures into treatment countries.

While working to break the link between 3T minerals and conflict, and improving governance and control of the trade, all partners in the Programme aim to encourage investment and maximise opportunities for local communities from their own resources. It is very encouraging therefore to not only see the high proportion of inclusion within iTSCi, but also an expected slight increase in overall production in the 2014 full year estimate which when increased further will drive local economies and development. This is illustrated in the graph below showing the share of iTSCi and non-iTSCi cassiterite over the period from 2010, including a forecast for year end 2014.

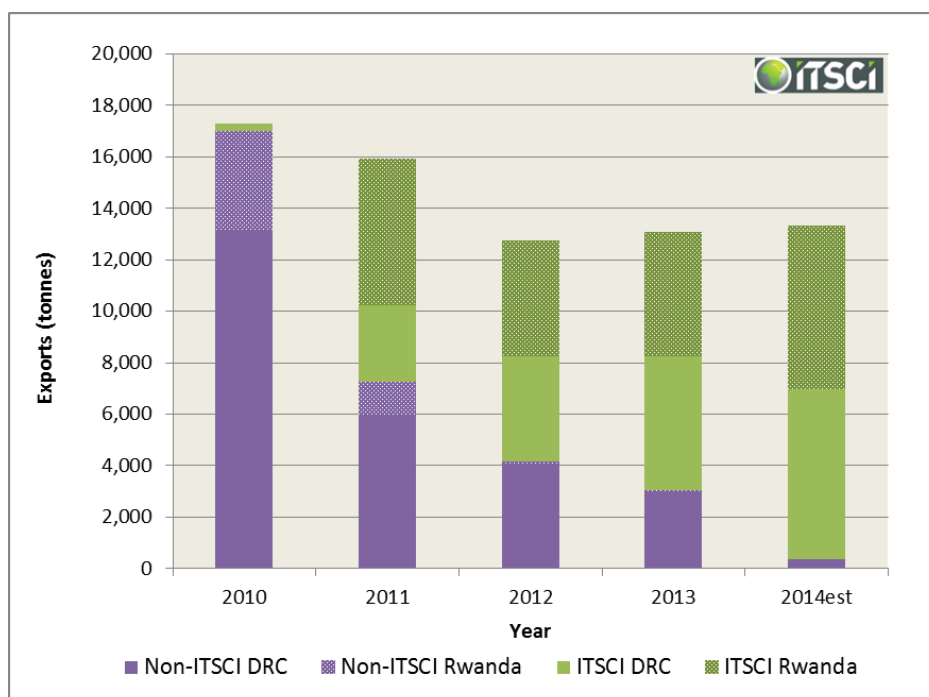
While iTSCi has included five new areas since early 2014 which are beginning to contribute to the increasing tonnages, this has been a significant financial challenge to upstream industry funds, the availability of which remains the limiting factor or roadblock in the speed of extension. The Programme intends to continue roll out to key areas still under embargo but, as stated previously, this could be achieved more rapidly with funding support from donors or other contributors.

iTSCI and officially reported cassiterite imports and exports 2010-H1 2014 (tonnes)

	2010	2011	2012	2013	H1 2014
Official reported exports					
DR Congo	13,415	8,943	8,104	8,182	3,478
Rwanda	3,874	6,952	4,637	4,895	3,110
Combined	17,289	15,895	12,741	13,077	6,588
iTSCI export tonnages					
DR Congo	300	2,960	4,069	5,208	3,304
Rwanda	0	5,679	4,517	4,828	3,188
Combined	0	8,639	8,586	10,036	6,492
iTSCI share of reported exports					
DR Congo	2%	33%	50%	64%	95%
Rwanda	0%	82%	97%	99%	102%
Combined	2%	54%	67%	77%	99%
Official reported imports from Central Africa					
Total leading importers	20,110	14,944	13,628	12,138	6,590
iTSCI exports versus identified imports	1%	58%	63%	83%	99%

Notes:

1. Leading importers are Malaysia, China, Thailand, Russia and India.
2. Coverage of imports may to be incomplete, particularly for 2014.
3. Data represents direct comparison of time periods, trading timing differences between export and import have not been accounted for.
4. iTSCI figures for 2011 do not represent an entire year as the majority of activity was post April 2011.
5. Burundi will be included at year end 2014 as exports restart.



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**About ITRI:**

ITRI is the world's foremost authority on tin with over 80 years' experience in tin related technologies. It is a membership based organisation representing major tin producers and smelters and is the premier source of tin related information. ITRI has specialist knowledge of tin use in all the major sectors as well as groups responsible for technology, statistical and market information, regulatory affairs and sustainability. It provides links to the main tin consuming sectors through a substantial network of industry contacts. The organisation hosts seminars, conferences and industry-specific group meetings. It also provides marketing and technical support to its members and the tin industry in general. ITRI is the tin representative to the iTSCi programme Steering Committee and Secretariat of the programme. Further information can be obtained from ITRI <http://www.itri.co.uk>

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