Our Focus is Zinc ... Our Strength is People
IZA VISION STATEMENT
A WORLD WHERE ZINC IS RECOGNIZED AS SUSTAINABLE AND ESSENTIAL FOR MODERN LIFE

ABOUT IZA

The International Zinc Association (IZA) was created in 1991 by a group of leading zinc producers and is guided by the principal of undertaking actions that positively influence the market and image of zinc.

The Association’s primary goal is to deliver value to its Members through innovative programs in its strategic focus areas of Environment and Sustainable Development, Technology and Market Development and Communications.

IZA provides a forum for the zinc industry to analyze and anticipate issues affecting zinc globally and to ensure a timely and appropriate response. IZA coordinates initiatives good for zinc that are best done collectively, undertaken either directly or through involvement and support of customer groups and related stakeholders on the local, regional and global levels.
2017 has been another very successful year for the International Zinc Association. We have set new strategic goals and launched new market development programs, new conferences and a new global structure - all with the objectives to grow and protect zinc market demand and maintain our Industry’s license to operate. Programs in Technology and Market Development, Environment, Health and Nutrition, Communications and Sustainability are all producing impressive results; many of these are highlighted in this report. IZA continues to raise the profile of zinc and the zinc industry.

As a service organization, IZA’s primary asset is its people. I had the opportunity of visiting the Brussels and Durham offices and meeting the people who make these programs happen. By all measures they are true professionals; dedicated and passionate about serving our Members by delivering quality programs. Frankly, I am amazed what these programs have accomplished. From advocacy in response to legislative challenges, technology research, developing new markets; educating decision makers in China, India, Latin America and Asia; contributing to food security and solving global zinc deficiency; communicating the sustainable value of zinc in a modern society; hosting numerous conferences and workshops – and this is all being done by a staff of 22, together with backup from key consultants. I have not seen another association deliver as much with this modest amount of resources.

IZA staff are well recognized as leaders in their field. In addition to a high level of professionalism, IZA staff act as Zinc ambassadors when building and growing relationships at technical forums, with regulatory bodies, our Members, and their customer base. These interactions help authenticate IZA’s reputation as an expert resource and provide conduits through which we can further communicate the value of zinc as a sustainable material, essential for modern life.

In addition to my appreciation of the IZA staff I would like to thank the Executive and Advisory Committees, the Board and Functional Committee members and all other member company representatives and consultants who have invested their time and knowledge in advancing our programs.

We have achieved a lot, but I have no doubt that we will develop more opportunities that will surprise the industry even more.
It is a common stereotype that associations put significant effort into projects yet results are not achieved for several years. IZA programs are designed to have immediate effect and long-term impact ensuring relevance for Members. Significant results have been achieved in all program areas during 2017. And these results have been possible due to the IZA staff expertise and their dedicated effort.

Environment and Sustainability
- Prevented zinc from being prioritized on the EU Water Framework Directive
- Stopped a bill in California which would have banned zinc oxide from tires
- Submitted scientifically sound dossiers to EU REACH on time
- Consulted with the US Environmental Protection Agency (USEPA), as part of a joint initiative, about better methods to measure zinc levels
- Convinced Danish authorities not to ban zinc due to worries about future reserves

Technology and Market Development
- Continuous galvanized rebar makes huge headway with a new US production plant and new product orders. Other potential producers now show strong interest.
- Several steel companies announced new automotive lines in US, Europe and Mexico utilizing GAP results.
- World Bank evaluates adding zinc to their global agricultural programs. Another 60,000 tonnes of zinc added in fertilizer market and new programs in DRC and Bangladesh show significant impact on crop growth.
- Following the success with offshore wind energy installations the zinc thermal spraying program was expanded to ships. A thermal sprayed ferry showed excellent performance.
- IZA technical seminars and conferences have positive impact on zinc consumption in S.E. Asia, China, India and Latin America.

Communications
- Successful new Zinc conferences in Brussels and Pittsburgh, complementing the International Zinc and Zinc Oxide Conferences. These conferences provide value to Members and additional revenue for IZA.
- Five new websites created and/or updated: ZNI, die casting, thermal spraying, Galvinfo and IZA-India.
- Two new brochures published on Sustainability and Thermal Spraying

These programs are all supported by a competent and efficient back office staff. Our Member company involvement and committee structure has provided excellent guidance in ensuring IZA projects help grow and protect the markets for zinc and provide Members a license to operate.
Thermal spraying is an exciting market opportunity for zinc to expand its market share to structures not easily serviced by the galvanizing industry. We successfully made zinc thermal spraying the default protection for offshore wind mill towers in Europe. Now we are focusing on the rest of the world as well as targeting the maritime market, such as Navy ships, cruise ships and ferry boats.

Martin van Leeuwen
Manager, Technology & Market Development
2017 was a landmark year in progressing the acceptance of galvanized reinforcing steel in North America. Our attendance at 20 trade shows and conferences and the delivery of several technical papers have increased the awareness and acceptance of galvanized rebar. With the new North America continuous galvanizing plant in operation we expect much stronger growth in this market.

Martin Gagné, Technology & Market Development
In addition to being an essential micronutrient, zinc has also been labeled a ‘Life Saving Commodity’ by the United Nations.

We played a key role in launching the Zinc Saves Kids program in support of UNICEF. Huge progress has been made in reducing chronic malnutrition and acute diarrhea by supplementing children with zinc. Most recently IZA worked with Peñoles and Zinc Nacional to expand the Zinc Saves Kids program into Mexico.
An additional 30,000 tonnes of zinc was added to Indian soils in 2017, with a total of 70,000 tonnes zinc per year being consumed. We are working with the government to increase the zinc critical limit in soils at a national level. This will raise the level of zinc deficiency of soils significantly and lead to an increased demand for zinc fertilizers. As well, we saw several additional fertilizer grades containing zinc approved - these are becoming increasingly popular with farmers.

Zinc consumption increased by over 30,000 tonnes in China in 2017; over 60,000 tonnes of zinc is now used annually. Our partnership with the Ministry of Agriculture has encouraged 20 million farmers to use zinc fertilizers. Over 40 million tonnes of zinc enriched grain have been produced, providing enhanced nutritional value to 200 million people including 40 million children.

The ZNI initiative benefits farmers, communities, governments and industry. We have successfully grown the zinc fertilizer market to over 265,000 tonnes per year with activities in India, China, Brazil, Mexico, Bangladesh and the US. We also assisted the Lundin Foundation and MMG with their sustainability programs in the Democratic Republic of Congo (DRC). Zinc crop trials have shown impressive results with maize yield increasing from 24% to over 100% versus the local DRC fertilizer practices.

In 2017, we developed a partnership with World Bank. A high-level seminar was held with the World Bank Agricultural Global Practice Group and opportunities to integrate zinc into their programs were identified.
In Europe we have launched a communication and market development program to grow the zinc die casting market. The die casting website now provides the most comprehensive information on zinc die castings in English, German, and French. This program reaches out to students, product designers and specifiers to make them aware of the versatility of zinc in parts and components. A series of newsletters will complement the new die casting brochure “Engineering in Zinc, Today’s Answer”.

Martin van Leeuwen
Manager, Technology & Market Development
IZA’s Galvanized Autobody Partnership (GAP) program, mainly financed by the steel industry, has shown that new higher strength and lighter weight steels can be galvanized with zinc. This is important in the fight against other materials such as aluminum and thus protecting the 600,000 tonne market. I am encouraged to see recent announcements in the U.S., Europe and Mexico from steel companies who have planned to install new lines using GAP technology. As well, we have huge opportunities for an additional 500,000 tonnes in China and India.

Frank Goodwin,
Director, Technology & Market Development
REACH continues to consume a good portion of IZA’s staff time. Over 30 zinc- and cadmium-related dossiers were registered and require follow-up. Two germanium- and six indium-substances were prepared for registration. All of this work requires preparing scientific dossiers which must be submitted in a timely fashion. Over 100 companies are served by the IZA secretariat.

Our diverse team has been able to provide the key data on ecotoxicology, environmental and workplace exposure, human toxicology and risk characterization.

Frank Van Assche, Director - European Affairs

I am focusing on the human toxicology aspects of REACH. Recent results from studies on indium and germanium will allow us to complete the registration process. Data from a recent human volunteer study on zinc oxide will be important in the setting of a new occupational exposure limit (OEL) for zinc oxide in the EU.

In cadmium, we are conducting an exposure study in the workplace to understand the threshold levels of toxicity. This is important for the future of cadmium production.

Noömi Lombaert, Manager - Regulatory Toxicology

My main focus is zinc oxide and nano zinc oxide. For REACH I manage the evaluation process with the German authorities and ensure compliance of the general registration file.

We also act as secretariat of the European Zinc Oxide Producers Association (ZOPA) and I manage the association’s activities including responding to key regulatory issues and facilitating ZOPA’s communication program. One of our key accomplishments this year is a brochure on the main uses and benefits of zinc oxide.

Christine Spirlet, Manager – Regulatory Affairs

I oversee the overall management of the four REACH Consortia - a challenging task. In 2017 we saw small tonnage producers join as they wish to have market access of zinc and the other substances in Europe. We are also supporting South Korean companies with registering their substances under Korea-REACH.

Christian Canoo, Senior Advisor
I worked closely with the EU Commission’s Joint Research Centre and Member State experts on the revision of the existing Water Framework Directive (WFD). Zinc has now been classified as ‘low risk’, and is presently no longer considered for prioritization. The consequences of a negative decision could have threatened hundreds of thousands of tonnes of zinc consumption. We continue to work closely with the Commission to ensure that sound science on zinc is applied.

Chris Cooper, Assistant – Environmental Affairs

IZA continues to respond to environmental issues. A major achievement was an IZA test program that showed that lead containing alloys release very small amounts of lead. IZA has advised members to declare zinc with up to 2% lead as non-reprotoxic when the new EU regulation on the classification of lead above 0.3% becomes effective in 2018.

We are also following new developments in the International Maritime Organization (IMO) regulations concerning the shipment of zinc concentrates. To date we have been successful in saving companies about $2 per tonne in shipping costs.

Mik Gilles, Manager – European Affairs
Our science-based approaches to resolving environmental issues are in good part responsible for our market protection success stories. In 2017, IZA successfully worked with other partners in defeating yet again another bill that would have restricted the use of zinc in tires in California.

IZA has entered into a Collaborative Research and Development Agreement (CRADA) between USEPA and seven other associations. This Agreement will develop guidance on deriving water quality standard for metals; and specific updates for zinc. The availability of bioavailability-based updates (Biotic Ligand Models - BLMs) will provide states like California the tools needed to appropriately assess and set sensible goals for impaired water bodies.

Eric van Genderen, Manager – Environment and Sustainability
In addition to supporting the EU Regulatory team I am responsible for the administration and communications of the four REACH Consortia. I help prepare the REACH newsletters and I update the REACH websites. I also organize the REACH management committee meetings and the annual General assemblies and assist with other IZA meetings. As well, I provide support to ZOPA’s communication programs.

Annette Mutombo, Executive Secretary

What a challenging year! We successfully implemented the transition of the accounting function from Belgium to North Carolina ensuring all invoices and the corresponding cost accounting, profit and loss statements and balance sheet were in good standing.

I was also happy to work on the IZA conferences in terms of negotiating with hotels, establishing the on-line registration system and calculating the financial results.

Dawn Raymond, Manager – Finance

In addition to supporting the Executive Director and coordinating IZA’s Board, Executive, Advisory and TMD/ESD Committees and organizing these meetings I manage membership and was excited to assume responsibility for Administration and Human Resources at the IZA Brussels office. One of my major accomplishments was the establishment of the IZA Branch Office as part of the headquarter move. I enjoy my job for the diversity of tasks and having the ability to establish contacts and interact with IZA’s diverse audiences.

Randa Chart, Executive Assistant, Membership, HR/Admin

FINANCE & ADMINISTRATION
Two new major conferences were successfully launched this year: one in Brussels which attracted over 150 delegates and the Zinc Metal Roundtable in Pittsburgh, PA, with over 100 attendees. I was proud to play a key role in the planning and organization processes.

And I have really enjoyed coordinating the Zinc Saves Kids program in support of UNICEF. Huge progress has been made in reducing chronic malnutrition and acute diarrhea by supplementing children with zinc.

Berit Wirths, Communications Manager
IZA had another successful year in China. We helped convince Chinese authorities to issue new building standards for continuously galvanized rebar. We also facilitated a GAP meeting with IZA members such as Baosteel to help increase the use of galvanized sheet steel for autobody panels.

We also organized a major International Galvanizing Technology Symposium and Exhibition with over 250 delegates. And we worked on some exciting new die casting opportunities. IZA continues to have a very good relationship with key Chinese organizations and government authorities such as the China Nonferrous Metals Industry Association (CNIA).

Annette Huang,
Chief Representative China
India has huge opportunities for growth of zinc and I am pleased to be helping to make this growth happen. India has launched an ambitious urban developing plan requiring 100 cities to become “Smart Cities” by encouraging state-of-the-art infrastructure. IZA had already organized meetings and seminars with key decision makers to promote galvanized steel. Feedback has been excellent and local galvanizing companies have received orders from several upcoming smart cities.

We have also been promoting galvanized rebar in infrastructure projects especially along the 7,800 km long coast line. Several steel producers have shown interest in installing continuous galvanized rebar lines.

Rahul Sharma,
Director, India
Zinc

...essential for modern life

International Zinc Association

contact@zinc.org • www.zinc.org