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example. In addition, Japan should actively participate in the exploration of platinum group metals in Zimbabwe such as the Hartley, Mhodoro and Selous projects.

In view of the worldwide prospects for the increasing demand for stainless steel, the demand for chromium is expected to grow steadily even if no steep rise is anticipated. Since the birth of the new government in South Africa, a trend towards increasing exports of intermediate/final products with more value added than before is predicted. The Government seems to be considering the possibility of imposing royalties on the export of ores and concentrates. A shift from the export of chromium ore to that of ferrochrome and towards increasing domestic production of stainless steel in South Africa is also observed. Moreover, ore supply from the Donskoy complex in Kazakhstan seems not to be stable. It appears that Japanese imports of chromium ore and ferrochrome from South Africa and Kazakhstan will not be as stable as before.

In South Africa, a joint venture between Nippon Denko and Samancor has been started resulting in a stable supply of ferrochrome to Japanese users mainly due to the maintenance of a friendly relationship. It would be wise for Japanese firms to start similar closer relationships like this with other chromium producers in South Africa. Also a closer Japanese cooperation with the Donskoy complex is needed.

The accomplishments of manganese ore producers and manganese ferroalloy manufacturers have been reduced, because of the fall in demand for manganese ferroalloy accompanying the recent reductions in the worldwide iron and steel production. The worldwide structure of manganese supply is changing as seen in recent movements such as capital and business links between the producers of manganese ore and manganese ferroalloy. An important initiative has

been taken by Sumitomo in its cooperation with Assoman.

In addition to the four major Japanese sources of manganese, i.e. Australia, South Africa, Gabon and Brazil, other countries should be sought in the future as new suppliers. In this connection, it would be important to develop closer relationships including joint ventures to produce manganese ferroalloys with the manganese producers, especially with those having extra supplying capacity, such as Samancor, Assoman, BHP and Comilog. ■

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