

**THE SOUTHERN AFRICAN INSTITUTE OF MINING AND METALLURGY
JOHANNESBURG 2012**

SYMPOSIUM SERIES S72

Fifth International

Platinum Conference

'A Catalyst for Change'

18–21 September 2012

Sun City, South Africa

VOLUME I

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FOREWORD

It is a great pleasure to welcome you to 'Platinum—a Catalyst for Change'. These platinum conferences are convened every two years by the Southern African Institute of Mining and Metallurgy and broadly structured around a theme. Previous themes have been 'Platinum Adding Value' in 2004, 'Platinum Surges Ahead' in 2006, 'Platinum in Transformation' in 2008, and 'Platinum in Transition—Boom or Bust' in 2010. With increasing industry maturity it was felt that the concept of platinum as a 'a catalyst for change' was relevant in 2012.

Owing to the high derived demand portion (industrial and autocatalysis) of the consumption of the platinum group metals (PGMs), overall demand for platinum and the other PGMs is closely correlated with economic activity. The ongoing European economic crisis has since early 2012 adversely affected the industry but, given the sound fundamentals of PGM demand, demand will rise again with increased economic activity. The challenge is to move through the current crisis without permanently damaging the supply side of industry or fuelling another unrealistic price spike.

In South Africa there is ongoing debate on resource nationalism and how to address the growing aspirations of the nation, security of electricity and water supplies, and the sustainability of wage demands in an industry burdened by costs. The triple evils of poverty, unemployment, and inequality must be addressed, but in a manner that ensures the sustainability of this cornerstone industry of the South African economy.

Hopefully, this event will provide a platform for role players across the value chain to interact and debate what can be done to set the industry on a new trajectory that leads to sustainability.

It is my pleasure to welcome delegates from abroad and South Africa to the Fifth International Platinum Conference, held at Sun City in the heart of the world's biggest platinum-producing region. I trust that you find the proceedings interesting and stimulating. I encourage you to participate in the proceedings, debate the issues, and enjoy networking with colleagues in the platinum industry.

Finally, a heartfelt thank you to the Organising Committee, the conferencing team of the SAIMM, and our willing and generous sponsors, without whom this conference would not have been possible.

Gordon Smith
Chairman
Organising Committee

Fifth International

Platinum Conference

'A Catalyst for Change'

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