

South Korea Mining Report Q2 2011

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Abstracts

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South Korea has small reserves of antimony, gold, copper, iron ore, lead, molybdenum, silver, tin, tungsten and zinc. The country's domestic coal reserves have been exhausted, although it holds reasonable quantities of non-metallic minerals such as kaolin, limestone, feldspar, quartzite and mica. South Korea is one of the world's leading steel producers and a leading producer of cadmium and slab zinc. Due to the country's limited mineral reserves, supply has been unable to meet demand from the country's industrial sector.

As such, South Korea is an overall net importer of mineral commodities and one of the region's main importers of coal, natural gas, nickel oxide sinter and ores and concentrates of copper, iron, lead and zinc. The current focus is on overseas exploration as the country seeks to secure supplies of raw materials to power its industrial base.

South Korea's mining and refining sectors could be boosted by events in Japan. In the short term, South Korean companies such as Korea Zinc are likely to benefit from greater demand for lead, as consumers resort to battery power for energy supplies. Looking further ahead, reconstruction efforts in Japan are likely to increase demand for South Korean steel and copper. That said, demand for uranium may be dampened by concern over safety following the earthquake.

Regulatory Environment South Korean law mandates that all land and resources come under the purview of the state, with the government determining the issuance of mining and processing licences. Given the country's small holdings of natural resources, activities are mostly focused on the processing of imported raw materials. Most of South Korea's large coal mining, natural gas, petrochemical and petroleum refining companies

are state-owned and come under the supervision of the Ministry of Commerce, Industry and Energy (MCIE). Other small, mid-sized mining, quarrying and metal processing companies are privately-owned and operated.

Key Players South Korea's mining industry is dominated by the country's largest and the world's third largest steelmaker Pohang Iron and Steel Company (POSCO), and state-owned entities Korea Zinc and Korea Resources (Kores). Other major players in the country's key steel sector include Hyundai Steel and Dongkuk Steel. Korea Zinc is South Korea's leading lead and zinc producer, covering 46% and 68% of domestic lead and zinc production respectively. Poongsan Corp is South Korea's leading nonferrous metals producer, while LS-Nikko Copper is the country's main copper producer.

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