



PROGRAM OUTLINE FOR THE ILZSG MEETINGS 14 - 16 OCTOBER 2025, LISBON

Venue: Altis Grand Hotel

Wednesday, 14 October

14:00 – 17:00 Joint Study Groups' Seminar A Liquid Asset: Managing Water In Mining And Metals

Presentations by prof. Dieudonne Tambwe, Ministry of Mines, **Congo D.R.**; Meidy Katrin Lengkey, APNI, **Indonesia**; Krzysztof Rajczykowski, Łukasiewicz Research Network – Non-Ferrous Metals Institute, **Poland**; Lies Eykens, Umicore, **Belgium**; Irene Ruiz Oriá, Atlantic Copper, **Spain**

19:30 – 21:30 Study Groups' Cocktail Reception at the Portuguese Red Cross HQ, Lisbon – *Venue: Palácio do Conde d'Óbidos – Coaches will leave from Altis Grand Hotel at 19:00*

Thursday, 15 October

09:00 – 12:00 Statistical and Forecasting Committee

- **Detailed Overview of World Lead and Zinc Supply and Demand for 2026-2027** – Presentation by João Jorge, Director of Market Research and Statistics, **ILZSG**
- **Positioning China's Lead and Zinc Industry in the Global Supply Chain** – Presentation by Zhang Zhiwei, Manager, Lead and Zinc Department, **Beijing Antaika Information**, China
- **A New Era of Low TCs: What is Driving This Trend?** – Presentation by Olga Hepting, Head of Zinc Markets, **CRU**, UK
- **Zinc (and Lead) in India** – Presentation by Claire Hassall, Director, **CHR Metals**, UK

14:00 – 15:30 Mine and Smelter Projects Committee

- **Boliden's Raw Materials Strategy in a Changing Market (title TBC)** – Presentation by Raymond Langevoort, Director Raw Materials, **Boliden**, Sweden
- **Review of Openings and Closures of Lead and Zinc Mines and Smelters During 2026 and Ongoing Projects**
- **Overview of Zinc Mining in Brazil** – Presentation by Thiers Lima, Mineral Resources Specialist and Deputy Coordinator for Economic Studies, Mineral Economics and Geoinformation, Brazil's National Mining Agency (**ANM**), Brazil

16:00 – 18:00 Industry Advisory Panel (IAP) Meeting

- **IAP discussion on the situation in the lead and zinc markets**
- **Circular Economy: Driving Competitiveness and Growth at Moura** – Presentation by Gustavo Santiago, Executive Manager – Metals Management and Circular Economy, **Grupo Moura**, Brazil
- **Zinc in Poland: From Mining to Smelting and Recycling. Circular Economy at Work** – Presentation by Marek Drosik, Member of the Board – Commercial Director, **ZGH Bolesław**, Poland
- **Technical Innovation Roadmap** – Presentation by Steve Binks, Senior Director of Regulatory Affairs, **International Lead Association (ILA)**, UK

Friday, 16 October

09:00 – 11:00 Economic and Environment Committee

- **China's Nonferrous Metals Industry 2026-2030: Pathways and Prospects for High-Quality Development** – Presentation by Ms. Mingyue Cao, Director General, International Cooperation Department, **China Nonferrous Metals Industry Association (CNIA)**, China
- **Recent Trade Policies on Scrap Metals Trade and Regulations Related to the Cross-Border Flow of Scrap Metals** – Presentation by Federico Zanotti, Trade and Environment Policy Officer, **Bureau of International Recycling (BIR)**
- **The Potential Implications of Climate Change, AI and New Battery Technologies for the Future of Lead** – Presentation by Huw Roberts, Director, **CHR Metals**, UK
- **Issues currently impacting the lead industry** – Presentation by Steve Binks, Senior Director Regulatory Affairs, **International Lead Association (ILA)**, UK
- **Key findings of the Study Groups' updated The World Lead Factbook 2026** – Presentation by Jianbin Meng, Director of Economics & Environment, **ILZSG**

11.30 – 12.30 Standing Committee (governments only)

12.30 – 13.00 Plenary Session