



The recent and apparently almost insatiable demand for minerals, stimulated largely by demand from the East, represents a huge opportunity for the Southern African mining industry. With the expectation of ten years of growth comes the rare chance to plan with a fair degree of certainty and enjoy the reward. Equally, South Africa's absorption into the BRIC group of nations, all of which have substantial commodity producing entities, reinforces our place in the league table of commodity producers. Currently China is the biggest miner at \$182 billion, followed by Brazil at \$26 billion, and South Africa third at \$21 billion. If the total potential of Southern Africa is considered, it can develop into the dominant supplier of minerals after China.

Southern Africa, however, is currently limited in its ability to fully exploit the opportunity, most notably because of a shortage of the required skills and the lack of adequate rail and harbour infrastructure. In these circumstances, the platinum sectors in South Africa and Zimbabwe are particularly well placed. Since the product is a precious metal, the volume to value ratio is small. Thus, the effect of the influence of infrastructure limitations has far less impact. Although skills for sustaining the industry are a concern, a veritable treasure chest of knowhow and intellectual property exists that will allow this part of our mining industry to quickly expand in response to demand. The platinum sector provides large foreign exchange earnings, represents a high multiplier effect on the host nation's gross domestic product, and is a great job creator.

What role should the SAIMM play to ensure the continued growth of the platinum mining industry? The development of improved technology, codes and procedures, greatly improves the certainty of the technical environment, thus lowering the risk for investors. Apart from the enormous contribution that scientists and engineers have made to beneficiate platinum group metals, new mining techniques to win the mineral in the first place are getting much greater attention. The SAIMM, through its members and through the schools, symposia and conferences it offers, is building the skills base for tomorrow's engineers, while providing ongoing engineering education for the engineers in this industry. In addition to the strictly technical aspects referred to above, the SAIMM contributes to the economic environment that creates mining opportunity. For example, the accuracy of reporting of reserves and their valuation is of fundamental importance for potential investors. The SIMRAC and SIMVAL codes used to report the extent and condition of reserves of operations or possible new projects, provide consistency for evaluating and planning mining activity by investors and mine operators.

This is the value that engineers, scientists, technologists, and professionals add to an industry. The Southern African Institute of Mining and Metallurgy is the only organization that identifies, represents, and promotes the interests and needs of these people on behalf of a region that is at another dawn of an opportunity. It is an opportunity, which, this time, has the potential to truly benefit all those who live here, unlike in the past. It is thus with enthusiasm that I look forward to the papers on platinum mining and beneficiation, which is the theme of the Journal in February.

Gys Landman
President, SAIMM