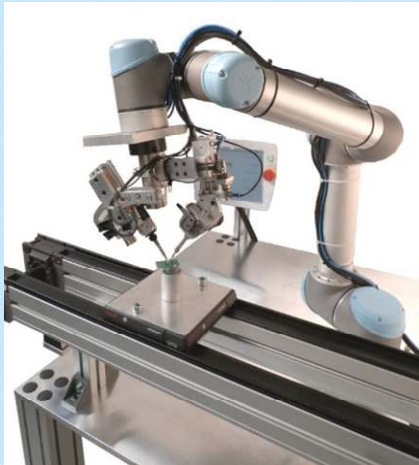


April — June



MALAYSIAN TIN PRODUCTS

QUARTERLY 2019
NEWSLETTER

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President's Note

Dear Members,

On 1 May 2019, the Minister of Water, Land and Natural Resources (KATS), YB Dr Xavier Jayakumar announced that the Government is planning to revitalise and re-energise Malaysia's tin mining industry as an important sector contributing towards enhancing the country's Gross Domestic Product (GDP). It is hoped that this announcement will give the necessary boost to the upstream tin exploration and mining sector which in turn will impact positively on the midstream and downstream sectors of the tin-based manufacturing industries in Malaysia.



According to the Governor of Bank Negara Malaysia, Datuk Nor Shamsiah Mohd Yunus, Malaysia's economy grew at a slower pace in the first quarter of 2019, in-line with the trend of the global economy. Nevertheless, the country's first quarter GDP growth of 4.5% compared to 5.3% in the same quarter of 2018 was still commendable. The growth was mainly supported by the services and manufacturing sectors. Overall, the economy was weighed down by lower public and private investments and slowdown in export activities. For a trade-reliant country like Malaysia, the trade war between the United States and China continued to pose a serious threat that will negatively impact our exports and imports.

To boost public sector spending, the Prime Minister of Malaysia, YAB Tun Dr Mahathir Mohamad made several announcements in April 2019, including the resumption of several mega infrastructure projects that were put on hold in 2018, such as the East Coast Rail Link and Bandar Malaysia which would be undertaken at a lower and more reasonable cost. The resumption of these projects will hopefully result into a stronger economic growth in the second half of 2019. Most economists are forecasting that Malaysia's GDP growth rate would be about 4.6% in 2019, compared to 4.7% in 2018.

On the global front, Malaysia maintained its 22nd ranking in the World Competitiveness Index for 2019 published by the IMD World Competitiveness Centre, Switzerland. Our country is ahead of South Korea and Japan at 28th and 30th spot, respectively. The ranking assessments were based on four competitiveness input factors, namely economic performance, government efficiency, business efficiency and infrastructure. In responding to that ranking, the International Trade and Industry Minister, Datuk Darell Leiking said that Malaysia's achievement reflected the positive sentiments of the business community towards the new Federal Government.

To conclude this brief Note, and on behalf of the Management Committee, may I wish all our Muslim colleagues Selamat Hari Raya Aidilfitri, Maaf Zahir dan Batin. To our Sabahan and Sarawakian friends, Selamat Hari Kaamatan and Hari Gawai.

With warmest regards,

Mat Tena'ain Abu Bakar

President

*Wishing Muslim Members
Of The Association
Selamat Hari Raya
Aidilfitri*



Economic News

Malaysia's Economy to Experience Moderate Growth in 2019

The Malaysian economy is expected to experience moderate growth in 2019 due to challenging external factors, said Economic Affairs Deputy Minister Dr Mohd Radzi Md Jidin. He said the factors include the United States (US) federal government's temporary shutdown which lasted for 35 days, from Dec 22, 2018, to January 25 this year -- the longest government shutdown in the US history.

Mohd Radzi said the shutdown affected the US' economic growth, which indirectly affected the world's economic growth during the first quarter of 2019. "Additionally, the uncertainties in the US' monetary policies, the slowdown in China's economic growth and the ongoing trade tension between the US and China also affected global economy and thus the nation's economy," he told the Dewan Rakyat here today.

Mohd Radzi was replying to a question from Datuk Dr Shamsul Anuar Nasarah (BN-Lenggong) who asked about Malaysia's economic projection for the year and the ministry's economic buffering mechanism to avoid an economic crisis. He said according to Bank Negara Malaysia's 2018 Annual Report, Malaysia's economic growth for 2019 will be supported by domestic growth, especially the demand from the private sector which continues to be the nation's main driver for economic growth.

Private consumption is expected to grow by 6.6 per cent while private investments are projected to rise by 4.9 per cent in 2019, he said. At the same time, all of the nation's main economic sectors are expected to record positive growth, with the service and manufacturing sectors projected to grow by 5.7 per cent and 4.8 per cent, respectively.

Both sectors remain as the largest contributors to the nation's economy at around 79 per cent, Mohd Radzi said, adding that the Gross Domestic Product is expected to remain on a steady growth path, expanding between 4.3 per cent and 4.8 per cent this year.

Source: The Star, 8 April 2019

Economic Slowdown Seen Extending into Second Quarter

Malaysia's economy may extend its slowdown into the second quarter amid weak domestic demand and global headwinds, according to economists. Kenanga Research retained its view that the manufacturing per-

formance would remain subdued going forward, due to the elevated uncertainty surrounding the final outcome of the US-China trade negotiation.

"Economic moderation in major global markets, including China, the EU and the US also partly contributed to our outlook. Along with an expectation of soft domestic demand, GDP growth will likely extend its slowdown into the second quarter of 2019 to 4.2% from an estimated 4.4% in the first quarter, adding to our whole year projection of a slower growth of 4.5%," it said in a research note today.

AmBank Research, too, expects first-quarter GDP growth to be weak following the lacklustre Industrial Production Index (IPI) performance. "It (Q1 GDP growth) should read around 4.1% with our downside at 3.8%. Underpinned by ongoing external headwinds, added with domestic issues, we believe the economy is likely to experience moderate growth in 2019. Our base case growth is 4.5% with the downside at 4.0%."

Bank Negara is set to release first-quarter GDP figures this Thursday. PublicInvest Research foresees Malaysia's exports and IPI to rebound once trade normalises despite the current jittery conditions. The IPI rebounded in March, rising 3.1% year-on-year, driven by a turnaround in manufacturing and sustained electricity demand while mining continued to contract.

PublicInvest Research said the IPI average of 2.7% for the first quarter of 2019 is its lowest since the third quarter of 2018 (2.4%), but noted that it should not be a source of concern as it was caused by an uncharacteristic situation namely the trade war, and is bound to recover once global trade normalises.

It said that the manufacturing sector may rebound once global trade normalises but electricity output may not sustain and is likely to ease in the second quarter. "Mining sector performance may normalise in the months ahead given the expectation of output rebound by natural gas though this may be offset by crude petroleum production constraints and extension of voluntary supply adjustments by Petronas," it added.

However, Kenanga Research and HLIB Research are less optimistic, due to the impact of the trade war on Malaysia's manufacturing performance. "In the immediate term, we anticipate manufacturing production to remain subdued following the re-escalation of US-China trade dispute that is anticipated to lead to increased uncertainty and pullback in investment and trade activities," said HLIB Research.

Meanwhile, UOB Global Economics & Markets Re-

search said Pakatan Harapan's new economic agenda is relevant and purposeful, given Malaysia's current social, economic and political landscape. "We think the government has detailed many key areas

that need fixing, some which are seen to be a tall order. Nevertheless, strong political will alongside firm execution and implementation will ensure that Malaysia moves forward to achieve these goals," it said in

Electrical & Electronic Industry News

Opportunities in Semiconductor

Malaysia is among one of the larger semiconductor markets in the world. But there is room for the local industry to further develop its capabilities in the area of design works to remain competitive amid slowing global sales.

Raj Kumar, founder and group chief executive officer of IGSS Ventures, notes that Malaysia has the potential to play a bigger role in the semiconductor industry than it does today. "This is especially so in specific capabilities and sectors with multiple advantages that can be better optimised and commercialised. The unique opportunity here is for Malaysia to start 'fabless product companies', but to do so, we must address the critical needs for top notch product design talents," he says. IGSS is a Singapore-based company focused on developing and commercialising semiconductor technologies.

According to reports, Malaysia is one of the most important semiconductor export markets in Asia – after China, Japan, South Korea, Singapore and Taiwan. Nonetheless, the country pales in comparison with other semiconductor nations in terms of investments. "Thus far, Malaysia has yet to have a strong home-grown semiconductor champion in the international arena like what TSMC is to Taiwan or Samsung is to South Korea. And China's investment capabilities, on the other hand, are well ahead of others," Raj adds.

There are generally two main types of semiconductor companies in Malaysia: integrated device manufacturer (IDM) and dedicated foundries. IDMs mainly design, manufacture and sell their own semiconductors, like Intel or Samsung. Dedicated foundries or fabs, on the other hand, are much like "factories for hire" which manufacture semiconductors according to their customers' specifications. The third category of companies is the fabless companies, which design semiconductors and contract out the manufacturing to other foundries or IDMs with spare manufacturing capacity.

Apart from developing a pool of product design talents, issues such as intellectual property protection, licensing and research and development (R&D) spending are also important issues, particularly for fabless companies. "The global semiconductor industry, in general, currently needs viable alternative loca-

tions to build their new fabs or relocate their existing niche fabs due to increasing higher operational costs in countries such as Japan, the US and Europe. If Malaysia develops an intensive national sectorial marketing strategy and further enhance or implement supporting incentives for semiconductor operators, it can very likely attract five to 10 other wafer fabs in the next 10-15 years. The potential is there for Malaysia to be akin to South Korea in branding itself as an ideal 'fab relocation' destination in chosen semiconductor fields in the next 15 years," says Raj.

He adds that growth and expansion of the industry lie in the areas of wafer foundries, outsourced semiconductor assembly and test industries, design services and in supporting entities with niche semiconductor technology capabilities. This will help to differentiate local players from the much bigger global competitors. "These sectors are already present in the country and it provides a strong base for industry players to further tap into," he says.

Other advantages that the local wafer fab industry have include a rich multinational culture, business-friendly laws and good comprehension of English. Another trend that will determine Malaysia's competitiveness is its ability to adapt and adopt new technology.

"The global technological trends led by top semiconductor and technology nations will affect and shape the local industries. Malaysia is playing catch-up. That is why we will need to prioritise first, the talent development for Industry 4.0, and build skill sets and foundations for companies and sectors that purely or mainly compete with overseas competitors for global businesses. The semiconductor industry is primarily export-based, hence we are competing with global competitors, and the need to adopt best practices quickly and effectively, is crucial. This also includes establishing business strategies and partnerships that can accelerate technology adoption and achieve business efficiencies to drive innovations," says Raj.

The government has been pushing the adoption of Industry 4.0 in the manufacturing sector for some time now. However, there is still a lot of education needed for producers to jump on the bandwagon – most don't know where to begin. While some form of upgrade has already taken place in some parts of the semicon-

ductor industry, these efforts can be further enhanced. An example is the increased automation in repetitive operations in the cleanroom, where robotics can be used in place of manual labour.

Raj also points out that the advent of big data and data analytics will be a game-changer for players as demand increases for better efficiencies at the fabs. "The policies and framework surrounding Industry 4.0 sees Malaysia focusing on the right fundamentals. In encouraging investments, innovations, talent development and growth, high-value manufacturers will almost certainly become a key economic driver. However, as is with any policies or framework, the secret to success lies in the execution of them," he cautions.

Certainly, SMEs in the industry will need greater support. Raj opines that this could come in the form of matching grants or loans to encourage SME innovation and investments in R&D. "Equally important, the universities and higher learning institutes need to strengthen relevant skills to meet rapidly evolving workplace requirements. There should be new syllabus in polytechnics and vocational schools with focus given to non-graduate students on key industries in Malaysia that will drive socio-economic results," he adds.

If all these are realised, Malaysia will be in a good position to play a bigger role in the global market. "Critical success factors include scale, overall capabilities and cost competitiveness, all of which can be improved through economies of scale." Currently, Singapore and Malaysia are the only two nations in South-East Asia with the capabilities to support wafer fabs, says Raj. He adds that there is plenty of room for both countries to collaborate within the region to create a stronger bloc to challenge larger markets.

While Singapore continues to invest in R&D and equipment ecosystem, it faces the challenge of land scarcity and low skilled manpower. Malaysia, on the other hand, has more than enough manpower and a cost advantage.

"The case for regionalisation is to optimise the individual capabilities within South-East Asia, and combine them as a collective industry powerhouse, better equipped to compete with bigger players. By scaling up regional cooperation, South-East Asia can create a robust semiconductor space in comparison with China, Taiwan and South Korea. By making us a force to be reckoned with, we are more likely to attract multi-billion semiconductor investments from Japan, the US and Europe where some of the niche fabs and supporting industries need to relocate or have a 'dual-location' strategy," he says.

Last year, IGSS tied-up with local semiconductor wafer foundry SilTerra Malaysia Sdn Bhd in a technology transfer deal. The partnership will significantly reduce production costs. "SilTerra's capabilities complement

ours as they have a world-class semiconductor facility and an aligned strategy of focusing on differentiated emerging niche semiconductor technologies so it can still grow healthily in this space. The partnership we have with SilTerra is both strategic and a trusted one, with a win-win model. With continued focus and intensity, it will positively change the future of both companies within the next three to five years," Raj says.

Source: The Star, 22 April 2019

'Malaysia Well-positioned to be a Primary Smart Manufacturing Destination'

Malaysia is well positioned to be a primary destination for smart manufacturing and high technology activities by leveraging on its strong manufacturing foundation. Deputy International Trade and Industry Minister Dr. Ong Kian Ming said a strong manufacturing sector would pave way to enhance productivity, job creation, innovation capacity, high-skilled talent development and economic and societal well-being.

"The evolving global manufacturing landscape calls for firms to re-evaluate their current approaches and strategies to remain relevant and competitive. Today's manufacturing processes have developed and evolved to focus on other core capabilities such as design and product development as well as supply chain management," he was speaking at the opening ceremony of the SemiCon Southeast Asia 2019, here, today.

Dr. Ong said the electrical and electronic (E&E) sector continues to be the driver of high technology, contributing to the nation's gross domestic product. "In 2018, E&E exports represented 38 per cent of Malaysia's total exports, the only sector recorded a trade surplus for 10th consecutive years," he added.

He said the growth of the E&E sector would continue to spearhead and dominate the country's export earnings as global demand in electronics content is driven by advancement in technology and the Fourth Industrial Revolution. "With good support from industry partners to complement the policy makers, changes can be made to accommodate and predict precisely how this transformation will impact different industries and countries," he said.

SemiCon chief executive officer Ajit Manocha said the exhibition underscores the significance of the E&E segment's economic contribution to Malaysia. "The showcase aims to bridge Malaysia's three important electronics clusters, while serving as a central connection point to the rest of Southeast Asia's electronics manufacturing supply chain," he said. Ajit added that rapid proliferation of digital technology across a multitude of applications market, Southeast Asia electronics manufacturing would continue to expand its semiconductor market share.

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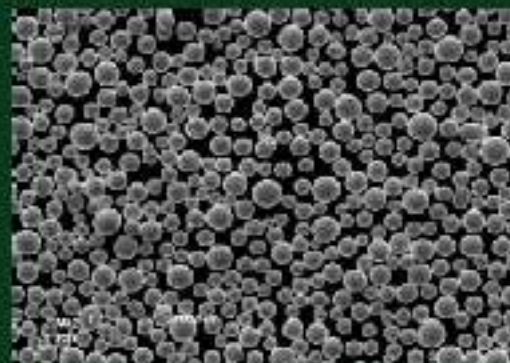
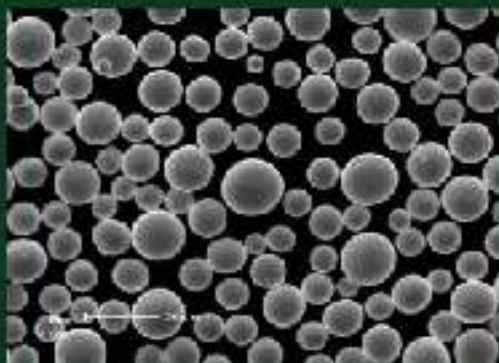
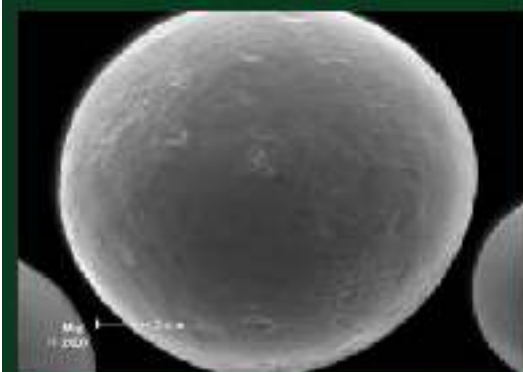
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Data / Statistics

Tin

MALAYSIAN TIN STATISTICS					
(In Tonnes)					
Period	Production of Tin-In-Concentrates	Imports of Tin-In-Concentrates	Refined Tin Production	Local Consumption	Exports of Tin Metal
2015	4,125	31,965	30,260	1,900	38,319
2016	4,158	30,536	26,849	2,238	27,470
2017	3,894	29,866	27,211	2,707	27,147
2018	3,868	27,450	27,115	1,964	27,342
2016					
Jan	357	2,667	2,550	167	2,172
Feb	304	2,273	2,939	205	2,779
Mar	377	1,697	2,611	213	3,153
Apr	361	2,333	2,381	233	2,849
May	349	1,984	2,529	236	2,563
Jun	342	2,101	1,951	151	2,029
Jul	311	2,054	1,873	116	1,720
Aug	303	2,293	2,159	200	2,238
Sep	335	1,823	1,865	204	1,730
Oct	347	1,948	1,920	173	1,766
Nov	359	2,267	1,977	154	2,149
Dec	378	2,172	2,094	186	1,834
2017					
Jan	351	2,377	1,683	171	1,530
Feb	316	2,033	2,167	203	2,635
Mar	306	1,723	2,044	322	2,091
Apr	275	2,441	1,832	263	1,777
May	339	2,598	2,572	218	2,326
Jun	308	2,446	2,121	258	1,732
Jul	333	3,154	2,605	320	2,768
Aug	329	2,428	2,812	178	3,106
Sep	314	2,565	2,149	179	2,275
Oct	323	2,775	2,256	225	2,116
Nov	368	2,740	2,478	204	2,510
Dec	338	2,586	2,492	166	2,281
2018					
Jan	308	2,424	2,060	171	1,950
Feb	297	2,046	2,214	190	2,009
Mar	323	2,488	2,340	158	2,584
Apr	330	2,430	2,111	192	2,401
May	336	2,895	2,343	171	2,435
Jun	292	2,494	2,219	192	2,162
Jul	342	2,609	2,571	162	2,687
Aug	393	2,619	2,470	215	2,257
Sep	280	1,653	2,068	149	1,899
Oct	319	2,284	2,282	117	2,138
Nov	324	1,844	2,563	102	2,746
Dec	306	1,874	1,874	145	2,074
2019*					
Jan	325	2,169	1,887	125	2,205
Feb	278	1,700	1,912	99	1,694
Mar	324	2,263	2,169	134	2,195
Apr	301	2,090	2,145	125	2,097
May	n.y.a	1,842	1,836	145	1,891
Jun	n.y.a	2,376	1,536	129	1,630

* : preliminary

n.y.a. : not yet available

Sources : Department of Statistics, Malaysia

Department of Minerals and Geoscience, Malaysia

Malaysia Smelting Corporation Bhd

DOMESTIC TIN CONSUMPTION (In Tonnes)					
Period	Total Consumption	Solder (*)	Tinplate	Pewter	Others (*)
2015	1,900	1,133	608	77	82
2016	2,238	1,314	750	86	88
2017	2,707	1,348	737	63	559
2018	1,964	1,019	759	39	147
2016					
Jan	167	97	63	3	4
Feb	205	140	46	12	7
Mar	213	144	63	3	3
Apr	233	150	62	15	6
May	236	117	69	14	36
Jun	151	82	59	3	7
Jul	116	44	58	11	3
Aug	200	133	59	6	2
Sep	204	152	45	3	4
Oct	173	79	73	13	8
Nov	154	83	67	0	4
Dec	186	93	86	3	4
2017					
Jan	171	102	54	12	3
Feb	203	133	64	2	4
Mar	322	139	76	13	94
Apr	263	100	72	2	89
May	218	150	61	3	4
Jun	258	108	61	12	77
Jul	320	143	76	1	100
Aug	178	79	62	2	35
Sep	179	101	40	1	37
Oct	225	104	68	4	49
Nov	204	95	49	1	59
Dec	166	94	54	10	8
2018					
Jan	171	101	57	3	10
Feb	190	133	54	1	2
Mar	158	93	49	13	3
Apr	192	103	78	1	10
May	171	106	56	1	8
Jun	192	116	61	13	2
Jul	162	99	60	0	3
Aug	215	132	75	1	7
Sep	149	62	62	1	24
Oct	117	23	69	1	24
Nov	102	11	61	0	30
Dec	145	40	77	4	24
2019**					
Jan	125	66	51	1	7
Feb	99	60	35	0	4
Mar	134	69	56	1	8
Apr	125	51	64	2	8
May	145	70	62	1	12
Jun	129	66	56	1	6

Sources : Department of Minerals and Geoscience, Malaysia
Malaysia Smelting Corporation Bhd

* : The figures include high-grade tin (99.9% Sn) imported for consumption.

** : Preliminary.

Note : Local consumption of tin metal refers to the use of tin in a particular application.

Sales to manufacturing industries have been used as proxy for consumption except in the case of manufacture of tinplate for which actual consumption data available.

WORLD STOCKS OF REFINED TIN			
(In Tonnes at Period End)			
Period End	LME Stocks	Country Stocks	US Strategic Stockpile
2015	6,140	9,956	4,020
2016	3,800	18,600	4,020
2017	2,235	19,245	4,020
2018	2,165	16,790	4,020
2016			
Jan	5,470	10,049	4,020
Feb	3,655	10,299	4,020
Mar	4,810	21,114	4,020
Apr	5,690	20,279	4,020
May	7,235	21,057	4,020
Jun	5,985	18,443	4,020
Jul	5,540	18,427	4,020
Aug	4,460	18,218	4,020
Sep	3,510	18,391	4,020
Oct	2,895	18,391	4,020
Nov	3,185	18,500	4,020
Dec	3,800	18,600	4,020
2017			
Jan	5,800	18,902	4,020
Feb	5,560	18,769	4,020
Mar	3,510	18,227	4,020
Apr	2,865	18,189	4,020
May	1,910	18,469	4,020
Jun	1,690	19,336	4,020
Jul	1,985	19,374	4,020
Aug	1,910	19,436	4,020
Sep	2,070	18,814	4,020
Oct	2,095	18,818	4,020
Nov	2,395	18,983	4,020
Dec	2,235	19,245	4,020
2018			
Jan	1,955	19,318	4,020
Feb	1,720	19,318	4,020
Mar	2,060	19,087	4,020
Apr	2,225	19,025	4,020
May	2,420	15,387	4,020
Jun	3,130	14,304	4,020
Jul	2,970	17,872	4,020
Aug	2,940	17,741	4,020
Sep	2,865	18,332	4,020
Oct	3,085	15,332	4,020
Nov	3,045	17,728	4,020
Dec	2,165	16,790	4,020
2019*			
Jan	1,845	16,439	4,020
Feb	1,325	16,552	4,020
Mar	950	22,333	4,020
Apr	890	23,132	4,020
May	2,810	23,083	4,020
Jun	6,045	23,524	4,020

Sources : Metal Bulletin / World Bureau of Metal Statistics

n.y.a : not yet available

KLTM & LME TIN PRICES				
	KLTM			LME CASH
	Average Price (*)		Total Turnover (Tonnes)	Average Price (USD/Tonne)
	(USD / Tonne)	(RM / Kg)		
2015	16,015	62.45	12,679	16,084
2016	17,528	72.75	11,568	17,982
2017	20,029	86.12	8,890	20,098
2018	20,151	80.99	9,075	20,168
2016				
Jan	13,745	59.62	1,269	13,777
Feb	15,324	64.19	1,294	15,654
Mar	16,848	68.60	1,334	16,996
Apr	17,029	66.42	1,050	17,068
May	16,908	68.35	817	16,757
Jun	16,909	69.06	956	16,985
Jul	17,786	71.44	758	17,845
Aug	18,373	74.03	824	18,413
Sep	19,466	80.08	849	19,590
Oct	20,003	83.60	755	20,182
Nov	21,001	91.17	897	21,235
Dec	21,011	93.77	765	21,286
2017				
Jan	20,801	92.92	722	20,750
Feb	19,548	86.99	658	19,492
Mar	19,762	87.80	744	19,832
Apr	19,885	87.59	687	19,991
May	20,104	86.84	744	20,231
Jun	19,707	84.39	625	19,702
Jul	20,178	86.64	711	20,273
Aug	20,438	87.67	774	20,570
Sep	20,729	87.39	722	20,855
Oct	20,450	86.58	780	20,469
Nov	19,477	81.46	923	19,575
Dec	19,353	78.93	800	19,440
2018				
Jan	20,415	80.77	973	20,711
Feb	21,558	84.37	756	21,694
Mar	21,049	82.15	933	21,214
Apr	21,151	82.22	744	21,340
May	20,740	82.36	710	20,900
Jun	20,616	82.43	907	20,663
Jul	19,687	79.80	857	19,700
Aug	19,299	78.99	642	19,281
Sep	18,905	78.29	736	18,999
Oct	19,048	79.18	762	19,129
Nov	19,133	80.09	536	19,139
Dec	19,208	80.17	519	19,243
2019				
Jan	20,417	84.05	719	20,480
Feb	21,268	86.67	628	21,268
Mar	21,317	86.95	1,046	21,444
Apr	20,528	84.48	833	20,684
May	19,394	80.85	388	19,531
Jun	19,065	79.34	344	19,177

Sources : Kuala Lumpur Tin Market/ Malaysia Smelting Corporation Bhd

Note : As from 1 February 2001, KLTM price is quoted in US Dollar

(*) KLTM's monthly average price is arrived at on a weighted average against total tonnage basis.

Malaysian Ringgit to US Dollar exchange rate was unpegged on 22.8.2005

LEAD

LME PRICES & STOCKS		
	Cash Settlement (US\$/Tonne)	Stocks Period End (Tonnes)
2016	2,230.83	194,900
2017	2,508.82	142,225
2018	1,965.47	107,375
2016		
Jan	1,646.95	188,125
Feb	1,771.57	211,475
Mar	1,808.02	155,975
Apr	1,728.67	174,325
May	1,714.43	185,375
Jun	1,713.91	185,150
Jul	1,834.88	187,075
Aug	1,838.89	187,275
Sep	1,942.02	190,250
Oct	2,039.93	188,700
Nov	2,178.84	187,725
Dec	2,230.83	194,900
2017		
Jan	2,236.69	189,050
Feb	2,321.73	189,600
Mar	2,277.30	184,275
Apr	2,231.31	169,425
May	2,131.67	180,275
Jun	2,131.18	164,150
Jul	2,266.40	152,800
Aug	2,357.32	148,425
Sep	2,377.29	157,475
Oct	2,506.30	149,250
Nov	2,464.41	145,000
Dec	2,508.82	142,225
2018		
Jan	2,589.77	133,250
Feb	2,580.83	125,225
Mar	2,397.00	129,100
Apr	2,357.38	130,775
May	2,363.88	133,475
Jun	2,440.74	131,775
Jul	2,212.91	127,025
Aug	2,064.86	122,925
Sep	2,028.23	115,700
Oct	1,985.15	113,550
Nov	1,940.16	105,125
Dec	1,965.47	107,375
2019		
Jan	1,994.16	72,450
Feb	2,062.08	76,875
Mar	2,054.57	78,750
Apr	1,948.85	74,425
May	1,817.21	69,400
Jun	1,891.50	65,750

COPPER

LME PRICES & STOCKS		
	Cash Settlement (US\$/Tonne)	Stocks Period End (Tonnes)
2016	5,666.25	311,825
2017	6,801.16	200,650
2018	6,094.21	132,175
Jan	4,462.75	239,400
Feb	4,595.48	193,475
Mar	4,947.55	143,400
Apr	4,851.12	154,675
May	4,708.35	154,350
Jun	4,630.64	189,125
Jul	4,855.79	210,075
Aug	4,758.20	304,775
Sep	4,707.18	371,775
Oct	4,732.14	319,475
Nov	5,443.25	236,675
Dec	5,666.25	311,825
Jan	5,737.43	260,850
Feb	5,941.55	200,725
Mar	5,821.52	283,900
Apr	5,697.67	253,675
May	5,591.50	308,000
Jun	5,699.48	278,275
Jul	5,978.60	295,525
Aug	6,478.18	223,500
Sep	6,583.19	295,500
Oct	6,797.39	273,675
Nov	6,825.57	183,525
Dec	6,801.16	200,650
Jan	7,080.30	304,675
Feb	7,001.80	328,000
Mar	6,795.76	383,025
Apr	6,838.55	325,525
May	6,821.76	317,950
Jun	6,954.79	289,875
Jul	6,248.18	251,950
Aug	6,039.75	262,475
Sep	6,020.03	199,125
Oct	6,215.89	136,675
Nov	6,193.00	134,200
Dec	6,094.21	132,175
Jan	5,932.02	149,950
Feb	6,278.20	126,100
Mar	6,451.02	168,525
Apr	6,445.10	225,925
May	6,028.31	211,800
Jun	5,868.43	240,900

SILVER

LONDON SPOT PRICES	
	London Spot (US Cents / Troy Oz)
2016	1,638.00
2017	1,616.00
2018	1,470.00
Jan	1,402.00
Feb	1,507.00
Mar	1,542.00
Apr	1,626.00
May	1,689.00
Jun	1,718.00
Jul	1,993.00
Aug	1,964.00
Sep	1,928.00
Oct	1,767.00
Nov	1,742.00
Dec	1,638.00
Jan	1,681.00
Feb	1,787.00
Mar	1,759.00
Apr	1,804.00
May	1,676.00
Jun	1,696.00
Jul	1,614.00
Aug	1,691.00
Sep	1,745.00
Oct	1,694.00
Nov	1,701.00
Dec	1,616.00
Jan	1,717.00
Feb	1,666.00
Mar	1,647.00
Apr	1,661.00
May	1,647.00
Jun	1,652.00
Jul	1,571.00
Aug	1,501.00
Sep	1,426.00
Oct	1,458.00
Nov	1,437.00
Dec	1,470.00
Jan	1,559.00
Feb	1,580.00
Mar	1,532.00
Apr	1,504.00
May	1,463.00
Jun	1,500.00

Source : London Metal Exchange
The Silver Institute

Association Members

Currently, the Association comprises one associate and 15 ordinary members covering the three main sectors of Malaysia's tin-based products manufacturing industry, namely the tinplate, solder and pewter sectors as listed below:

ORDINARY MEMBERS:

TINPLATE

Perusahaan Sadur Timah Malaysia Bhd (PERSTIMA)

SOLDER

Henkel (M) Sdn Bhd
Metahub Industries Sdn Bhd
Nihon Superior (M) Sdn Bhd
RedRing Solder (M) Sdn Bhd
Selayang Metal Industries Sdn Bhd
Selayang Solder Sdn Bhd
Senju (M) Sdn Bhd
Shen Mao Solder (M) Sdn Bhd
Premium Metal Sdn Bhd

PEWTER

Oriental Pewter Sdn Bhd
Present & Artifact Sdn Bhd
Royal Selangor International Sdn Bhd
Selwin Pewter Sdn Bhd

ASSOCIATE MEMBER:

Malaysia Smelting Corporation Bhd



MSC – A Global Integrated Tin Mining and Smelting Group

The MSC Group is currently one of the world's leading integrated producers of tin metal and tin based products and a global leader in custom tin smelting since 1887.

The MSC Group is currently one of the world's leading integrated producer of tin metal and tin-based products and a global leader in custom tin smelting. The Group's existing custom smelting facility in Butterworth is one of the world's largest and, since its inception in 1902, has been supplying the world with the MSC Straits Refined tin brand which is registered at LME (London Metal Exchange) and KLTM (Kuala Lumpur Tin Market). The brand is accepted worldwide and has purity ranging from the standard Grade A (99.85% Sn) to the premium grade electrolytic tin (99.99% Sn). In 2018, the Group produced 27,085 tonnes of tin metal thus sustaining its global position as the third largest supplier of tin metal.

With its unsurpassed global reputation and stature built on experience, trust and integrity from its custom smelting business, the Group has now become a fully integrated tin producer with its acquisition of Rahman Hydraulic Tin Sdn. Bhd. (RHT) in November 2004. RHT has the distinction of operating the largest open-pit eluvial tin mine in the country. Extensive exploration works and improvements to its process flowsheet since the takeover have transformed RHT to become a very significant tin producer in Malaysia.

The MSC Group is currently refurbishing an ISASMELT furnace located in Port Klang to carry out custom tin smelting. The ISASMELT furnace which uses the revolutionary TSL (Top Submerged Lance) technology will replace the reverberatory furnaces and will herald a new era and add a new dimension to the Group's smelting technology.

The ISASMELT furnace has a high intrinsic smelting capacity coupled with a lower unit smelting cost which will give the Group a competitive edge in its feed materials sourcing activity. The new smelter's location is equally strategic due to its proximity to the port and LME warehouse.

Apart from the operational and cost-saving benefits, the Group's carbon footprint will also be minimised with the full commissioning of the new smelter in Port Klang. The ISASMELT furnace uses natural gas as fuel for its smelting process, further improving the Group's environmental performance. The new plant will also be equipped with a waste heat recovery and photoelectric generation function to produce power, reducing the Group's dependency on fossil fuels. This will lead to the shrinking of the Group's greenhouse gas emission, making the MSC Group one of the world's most cost-efficient smelter.

Meanwhile, our tin mining arm, RHT, will be upgrading the existing hydro generator plant at the mines located in Klian Intan, with the aim of becoming more energy efficient. Our efforts are centred on utilising renewable energies when possible, in line with the Group's aim to become an environmentally friendly and sustainable global integrated tin producer.

The Group's niche expertise in tin is continually being strengthened in all areas over the entire

MSC will pursue its growth strategy on its core business in tin through strategic acquisitions and organic growth where its core expertise can add value particularly in increasing operating efficiencies, innovating products and services to ensure its continued leadership position in the industry.

We believe that our people shape our success, which is why we make every effort to ensure that they are equipped with the right resources and a conducive workplace to enable them to develop holistically.

GROWTH STRATEGY

The Group's niche expertise in tin is continually being strengthened in all areas over the entire global tin supply chain covering geology, mining, mineral processing, smelting, marketing, resource management and financing.

MSC will pursue its growth strategy on its core business in tin through strategic acquisitions and organic growth where its core expertise, skills and capabilities can add value and make a difference particularly in increasing operating efficiencies, innovating products and services as well as forging global commercial and marketing networks to ensure its continued leadership position in the industry.

Investment opportunities will continue to be evaluated and the Group may in future decide to invest in selective projects that meet its investment criteria. Main emphasis will be on opportunities in regions where the country risks could be effectively managed and that the mines could be developed and operated with relatively lower cost structure.



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MSC
Malaysia Smelting Corporation Berhad



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About Us

RIAN RESOURCES SDN. BHD. Is established in September 2017 in Johor, Malaysia, due to demand on secondary tin refining. The management and production team have long term experiences in the tin industry. We believe in having good production systems and compliances such as ISO 9001, ISO 14000 and CFSI. Our future plan is to have capability to smelter and refine 4nine tin.

Quality Policy

Rian Resources Sdn Bhd shall always meet and exceed our customer's tin products requirements and expectations.

Conflict Free Mineral Policy

Rian Resources Sdn. Bhd. shall always use and process tin products from CFSI certified tin smelters:

- A. Being compliance at all times with 3TG conflict material as per section 1502 of the Dodd Frank Wall Street reform and consumer protection act of 2010. In particular origin from the Democratic Republic of Congo (DRC) and its adjoining countries.
- B. Being diligent to ensure the tin products are traceable to CFSI certified tin smelters in accordance with the "OECD Due Diligence for Responsible Supply Chains of Mineral from Conflict-Affected and High Risk Areas" to establish conflict minerals management mechanism.
- C. We promise NOT to process 3TG that directly or indirectly benefit armed groups that are perpetrators of human rights abuse from the Democratic Republic of Congo (DRC). To other origins, we'll require all necessary documentation certificates complying to EICC-GeSI conflict free rules.

