2010 Minerals Yearbook

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The Mineral Industry of Belarus

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Belarus' mineral production enterprises included two metalworks plants, a nitrogen production enterprise, two crude oil refineries, and a potash mining company. The country's only mineral production enterprise that played a major role in world markets was its potash mining firm OAO Belaruskali. Although Belarus does not have significant sources of fuel minerals on its territory, it had a number of energy infrastructure establishments (oil pipelines, gas pipelines, and two large oil refineries) that positioned the country as an important player in the export of oil and gas to Europe from Russia.

Minerals in the National Economy

In 2010, the industrial production of Belarus contributed 26.8% to the Republic's gross domestic product (GDP). The fuel sector accounted for 17.6% of the country's total industrial production; the chemical and petrochemical sector, 13.1%; the construction materials sector, 5.4%; and metallurgy, 4.0%. In 2010, the value of overall mineral industry output increased by 9.1% compared with that of 2009; the value of produced ferrous metals increased by 22.8%, and that of construction materials increased by 13.2% compared with that of 2009. At the same time, the output of the fuel sector decreased in value by 21.9%, and that of the chemical and petrochemical sector dropped by 15.9% (National Statistical Committee of the Republic of Belarus, 2011c, d). The decreases were largely owing to the dispute with Russia concerning the pricing of crude oil and gas delivered to Belarus that resulted in drastic reductions in Belarus' oil refinery output in the beginning of the year. Previously, the economy of Belarus was dependent on oil and natural gas imported from Russia. In 2010, however, Belarus was involved in gas and oil disputes with Russia and had to find new sources of crude petroleum for its refineries (Khodasevich, 2010).

Starting in 2010, Russia changed the oil pricing schemes for Belarus. The first 6.3 million metric tons (Mt) of oil delivered to Belarusian refineries was assumed to be used for domestic consumption in Belarus; consequently, this oil was not subject to Russian customs duties and was sold at the Russian internal price [about $300 per metric ton, or $41 per barrel in January 2010]. All delivered oil beyond this limit, however, was to be levied the same customs duty as the oil exported to Western Europe, which effectively raised the price to about $550 per metric ton, or $75 per barrel (Korzhubaev and others, 2011). In March 2010, the Government of Belarus signed a contract with the Government of Venezuela and started importing crude oil from South America. Although high transportation costs and the complex logistics made Venezuelan oil more cumbersome and expensive to import, Venezuelan oil was of the light "Santa Barbara" type of crude oil and could be refined more effectively than the Russian heavy type of crude oil (known as "Urals"). The transportation channels used for Venezuelan oil included tanker transportation to the Ports of Klaipeda (in Lithuania), Muuga (in Estonia), and Odessa (in Ukraine), and with further transportation by either rail or pipeline (the Odessa-Brody pipeline in reverse regime). In 2010, Belarus imported 1.8 Mt of crude oil from Venezuela whereas imports from Russia dwindled to 13 Mt from 21.5 Mt in 2009 (National Statistical Committee of the Republic of Belarus, 2011e; PO Khimmash, 2011).

Belarus also set up a contract with Azerbaijan to import "Azeri Light" crude oil. The transportation channel for this oil was by tanker to the Port of Yuzhnyi in Ukraine and then through the Druzhba and the Odessa-Brody pipelines to the Mozyr oil refinery in Belarus. Although the negotiations with the Azerbaijani side were completed in 2010, the first oil from Azerbaijan was not delivered to Belarus until 2011 (Deutsche-Welle, 2011).

In September 2010, Russia announced the elimination of the customs duty on the oil exported to Belarus but that the refinery products exported from Belarus and the crude oil reexported to other countries were to be levied Russian customs duties. The new customs duty regime was supposed to go into effect in January 2011 (Lenta.ru, 2010).

The gas pipeline that passed through Belarus was a significant export route for gas from Russia to Europe and was operated by OAO Beltransgaz. In 2007, the Russian natural gas monopoly OAO Gazprom agreed to purchase 50% of Beltransgaz stock for $2.5 billion, and the other 50% would continue to be owned by the Government of Belarus. Under the agreement, Belarusian domestic natural gas customers could purchase Russian gas at a discounted rate compared with the amount paid by consumers in the European Union (EU). For 2010, the gas price for Belarus was set at 90% of the natural gas price set for the EU. Beginning in 2011, however, Belarus would pay the same price for natural gas as other European countries ($230 per cubic meter), but would not be charged any export duties (BBC Russian.com, 2007; OAO Beltransgaz, 2011).

Production

In 2010, Belarus continued to recover from the recession, and production of most mineral commodities returned to prerecession levels. Production of potash increased by 110% to 5.2 Mt. Belarus increased production of all steel products: output of steel pipes increased by 70.6% to 183,200 metric tons (t); steel cord, by 34.8% to 92,900 t; crude steel, by 9.1% to 2.7 Mt; and rolled steel, by 6.9% to 2.5 Mt. Other minerals for which production increased included sulfuric acid, the output of which increased by 7.0% to 891,000 t; peat, by 4.2% to 2,593 t; and cement, by 4.1% to 4.5 Mt. The only mineral commodity for which output decreased sharply was refined petroleum—production of refined petroleum decreased by 24% to about 16.5 Mt (National Statistical Committee of the Republic of Belarus, 2011a, c, d).

Structure of the Mineral Industry

Most of the mineral industry enterprises were united under the State Concern for Oil and Chemistry Belneftekhim. Belneftekhim included OAO Belaruskali, which was one of the leading potash producers in the world; OAO Grodno Azot, which specialized in the production of ammonia, nitrogenous fertilizers, and sulfuric acid; two oil refineries (OAO Naftan and OAO Mozyr NPZ), which had total annual throughput capacity of 22 Mt; and almost 50 other organizations. Belarus had adopted an industry privatization plan and created a list of enterprises that were subject to privatization in 2008 through 2010. The list included only smaller production facilities, however, and excluded all of the country's enterprises of national significance (Romanchuk, 2011).

In 2010, Belarus found itself in need of financial resources and was reconsidering its position on privatization of large companies. In July 2010, the Parliament voted to exclude the potash producer Belaruskali from the list of the enterprises that cannot be privatized. Other candidates for privatization and sale mentioned in the media were Grodno Azot and the oil refineries. Nevertheless, as of the end of 2010, no privatization deals had been made (RIA Novosti, 2011).

Commodity Review

Metals

Iron and Steel.—The Byelorussian Steel Works (BMZ) remained the predominant producer of iron and steel in Belarus. The BMZ's main plant, which was located in the city of Zhlobin, accounted for more than 90% of total national steel production. It consisted of four production divisions that engaged in steel melting, steel rolling, steel cord and wire production, and pipe rolling. The steel melting division included a scrap preparation shop and two electric melt shops. The rolling production unit consisted of a section rolling shop with three rolling mills that also produced steel cord and wire.

In 2010, the Zhlobin plant produced 2,530,949 t of raw steel, 2,098,711 t of rolled steel, 97,027 t of steel pipes, 92,883 t of steel cord, 37,177 t of hose wire, 29,937 t of bronze-plated bead wire, and 193,868 t of other steel wire. The composition of the company's products had been shifting towards an increase in the percentage of high-tech output, such as wire products and steel pipes. In addition to the Zhlobin plant, the BMZ Group included three other metallurgical enterprises: the Gomel Casting Plant; OAO Mogilev Metallurgical Works (MMZ), which specialized in the production of welded pipes; and the Rechitsa Metizny Plant (RMZ). Some of the most competitive products of BMZ included reinforcing bar and steel cord for tires. Steel cord produced by BMZ was used by all major tire manufacturers in the world; reportedly, 15% of world steel tire cord was produced at BMZ (Byelorussian Steel Works, 2011).

In 2010, BMZ exported its products to Africa, the Commonwealth of Independent States (CIS), Europe, and the Middle East. The company developed new steel markets, such as in Albania, the Democratic Republic of the Congo [Congo (Kinshasa)], Hong Kong, Mauritania, Switzerland, and Venezuela. In 2010, BMZ delivered to Europe and the CIS countries 750,839 t and 508,735 t of its products, respectively, whereas Africa and the Middle East received 562,038 t of Belarusian steel. The increase in exports to European countries was owing to increased demand at tire and rubber plants and an increase in demand for steel pipes by the European engineering industry. At the same time, the recovery of construction activity in the CIS countries led to increased demand for construction materials (fiber, reinforcing bar, and wire rods) (Byelorussian Steel Works, 2011; National Statistical Committee of the Republic of Belarus, 2011e).

Industrial Minerals

Cement.—Cement production in Belarus was conducted by three major cement plants. PRUP Krichevzementnoshifer in the Mogilev region was the leading cement producer; it had a capacity of 1.8 million metric tons per year (Mt/yr) and also manufactured asbestos cement boards. PRUP Belarusian Cement Plant (BCZ), which was also known as Kostyukovichi Cement Plant, was also located in the Mogilev region and produced cement, chalk, and lime. BCZ had won many awards for the quality of its products; it had a capacity to produce 1.1 Mt/yr of cement. OAO Krasnoselskstroymaterialy (also known as the Volkowysk Cement Plant) was located in the Grodno region. In addition to cement, it produced asbestos boards, chalk, concrete blocks, dry builders mixes, and lime, and had a production capacity of 900,000 t of cement (Nezavisimyi Stroitel'nyi Portal, 2011; PRUP Belarusian Cement Plant, 2011).

With a total national domestic consumption of about 4.5 Mt/yr, domestic cement producers could not meet domestic demand for cement. By the beginning of 2011, the domestic shortage reached 2 Mt/yr. Three new production lines (one new line for each of the three cement plants) were being constructed in cooperation with Chinese company CITIC Group, formerly known as the China International Trust and Investment Corp.; the combined cost of the project was $1.3 billion. The new production lines were planned to be completed in 2011, but as of March 2011, only about 30% of the construction had been done. Another new cement plant in the Gomel region was being built by Azarab Industries of Iran. When all new plants start production, the total capacity was expected to increase by 6 Mt/yr (21.BY, 2011; Bulatetskaya, 2011).

Nitrogen.—Grodno Azot was the leading producer of nitrogen-based fertilizers and liquid ammonia in Belarus. It specialized in the production of ammonium sulfate, biodiesel fuel, caprolactam, carbamide, carbamide-ammonium nitrate mixture (CAN), liquid ammonia, liquid carbon dioxide, and methanol. About 40% of the company's products was exported, and the rest was used to satisfy domestic demand. The trademark of Grodno Azot was registered in 18 countries (OAO Grodno Azot, 2011).

Grodno Azot adopted a program of modernization for 2010 through 2016 that was expected to increase its capacity by 40% at a cost between $1.3 billion and $1.5 billion. The main component of the modernization program was a new facility that would be able to produce all three main products—ammonium, carbamide, and methanol—and would provide greater flexibility

in choosing the production mix, depending on market demand (National Statistical Committee of the Republic of Belarus, 2011b; OAO Grodno Azot, 2011).

As a highly energy-intensive enterprise, Grodno Azot had been affected by the recent natural gas conflicts with Russia. Although the Government of Belarus shielded producers "of republican scale," such as Grodno Azot, from the two hikes in natural gas prices during 2010, in the long run, the company's profits were likely to be eroded by rising energy prices.

Potash.—OAO Belaruskali was one of the world's leading producers of potash mineral fertilizers and had a 16% share of the world market. In 2010, the production of potash in Belarus had increased to its pre-recession production level of 5.2 Mt from about 2.5 Mt in 2009. Potash was the leading export product for Belarus, and potash exports were valued at more than $2.2 billion. About 80% of the company's output was exported to China, East Asia, Europe, India, the Mediterranean region, North America, South Africa, and South America; 97.3% of potash exports was directed to countries outside of the CIS. The leading importers of Belarusian potash were Brazil (27.9%), India (14.7%), and China (10.2%) (Jasinski, 2011; OAO Belaruskali, 2011).

The Starobin potash deposit that Belaruskali mined contains magnesium salt, rock salt, and sylvinite. Commercial levels of potash occur at depths of 400 to 1,200 meters (m) and deeper. The thickness of individual beds of potash varies from 4 to 20 m. Potash salts are located inside layers of rock salt. The Belaruskali development program for the period 2006 through 2012 included development of the Krasnoslobodskiy Mine. The first production line of the Krasnoslobodskiy Mine was constructed in 2009, and the second and third lines were under construction in 2010. Other mines in early stages of exploration were the Beryozovskiy section of the deposit and the Darasinsky Mine. Belaruskali expected to increase its production capacity to 11 Mt/yr by 2015 (OAO Belaruskali, 2011).

In 2010, the president of Belarus signed a decree about the conversion of Belaruskali into a joint stock company. Prior to 2010, the enterprises that produced potash fertilizers were, by law, exclusively owned by the Government. In 2010, multiple rumors about probable buyers of Belaruskali as well as the market price of the company, were circulated in the press, but the sale did not take place. By different estimates, Belaruskali was worth between $15 and $30 billion (RIA Novosti, 2011).

Mineral Fuels

Peat.—In Belarus, peat was produced by a large number of small plants located throughout the country. Recent difficulties related to access to Russian natural gas and petroleum had made using peat as a fuel more attractive. In 2008, Belarus adopted a new Government program that was intended to increase peat production for the period of 2008 through 2020. According to this program, peat extraction was expected to increase to 4.4 Mt/yr by 2020 compared with production in 2010 of 2.4 Mt (Sovyet Ministrov Respubliki Belarus, 2008). The goal of the program was to increase the percentage of local and alternative energy sources to 25%. The peat program met significant resistance from the environmental community of Belarus, however. The main concern was that increased peat extraction is likely to destroy famous Belorussian marshes and their ecosystems and lead to increased peat fires while making renewable types of energy, such as biomass, less attractive (Zelenaya Belarus, 2011). As a result, it was unclear whether the peat program would continue as planned in the future.

Petroleum.—Petroleum reserves in Belarus are limited and provide only a small fraction of the crude petroleum supply for the country's refineries. Moreover, the Government limits annual extraction of several mineral resources, such as petroleum, salt, and sand. As a result, annual petroleum extraction was 1.70 Mt in 2010 compared with 1.72 Mt in 2009. The limit for 2011 was set at 1.68 Mt (Novosti@Mail.ru, 2011).

The output of refined oil in 2010 dropped to about 16.5 Mt from 21.6 Mt in 2009. The reason was the continuing conflict with Russia concerning the price of the Russian crude oil. Nevertheless, sales of refined petroleum contributed $6.7 billion to the country's export revenue (or 26.85% of the total revenue). The importers of Belarusian gasoline and other refinery products in 2010 included the Netherlands (43.3%), Ukraine (19.5%), the United Kingdom (14.1%), and Latvia (8.0%) (National Statistical Committee of the Republic of Belarus, 2011e; OAO Mozyr NPZ, 2011; OAO Naftan, 2011).

Outlook

Belarus is expected to continue to be a major supplier of potash to the world markets and to develop additional mines in the Starobin deposit. The future of other sectors of the mineral industry, especially mineral fuels, is highly uncertain. It is expected that in the years to come Belarus may privatize and sell some of its flagship enterprises, such as Belaruskali, Grodno Azot, OAO Mozyr NPZ, and OAO Naftan. If some of those facilities change owners, the direction of enterprise development may be affected. Finally, it is unclear how Belarus will continue to address the issues of its energy dependence on Russia. Although by the end of 2010 the country had reached a new agreement with Russia about oil prices, it also developed new crude oil sources for its refineries, such as Azerbaijan, Kazakhstan, and Venezuela. The future direction of Belarus' energy sector is likely to depend on political relations with Russia and on the country's ability to develop and maintain a reliable business network with countries outside of the CIS community.

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TABLE 1

BELARUS: PRODUCTION OF MINERAL COMMODITIES[1]

(Thousand metric tons unless otherwise specified)

Commodity		2006	2007	2008	2009	2010
METALS						
Steel:						
Crude		2,297	2,387	2,660	2,449	2,672
Rolled		2,047	2,192	2,387	2,299	2,458
Pipes	metric tons	134,200	147,900	145,000	107,400 r	183,200
Steel cord	do.	86,400	87,200	96,500	68,900	92,900
INDUSTRIAL MINERALS						
Cement		3,495	3,820	4,219	4,350	4,531
Diamond, synthetic[e]	thousand carats	25,000	25,000	25,000	25,000	25,000
Lime		853	925	900 r	787 r	805
Nitrogen, N content of ammonia	metric tons	815,000	834,000 r	743,400 r	828,600 r	835,900
Potash, K_2O equivalent		4,605	4,972	4,968	2,485	5,223
Salt[2]	metric tons	2,075,693	1,665,350	1,476,000	1,695,100	1,700,000 e
Sulfuric acid		756	788	857	833	891 e
MINERAL FUELS AND RELATED MATERIALS						
Natural gas	million cubic meters	219	201	203	205	213
Peat:						
Horticultural use		300	318	395	272	241
Fuel use		2,500	2,502	2,361	2,216 r	2,352
Total		2,800	2,820	2,756	2,488 r	2,593
Petroleum:						
Crude		1,780	1,760	1,740	1,720	1,700
Refined		21,253	21,349	21,305	21,634	16,455

[e]Estimated; estimated data are rounded to no more than three significant digits; may not add to totals shown. [r]Revised. do. Ditto.

[1]Table includes data available through December 14, 2011.

[2]Includes byproduct salt from potash production.

TABLE 2
BELARUS: STRUCTURE OF THE MINERAL INDUSTRY IN 2010

(Metric tons)

Commodity	Major operating companies and major equity owners	Location of main facilities	Annual capacity[e]
Cement	OAO Krasnoselskstroymaterialy	Hrodzyenskaya Voblasts'	900,000
Do.	PRUP Krichevzementnoshifer	Mahylyowskaya Voblasts'	1,800,000
Do.	PRUP Belarusian Cement Plant (BCZ)	do.	1,100,000
Diamond	Gomel Production Association Kristall	Homyel'skaya Voblasts'	NA
Nitrogen	OAO Grodno Azot (Belneftekhim)	Hrodzyenskaya Voblasts'	950,000 [1]
Peat, fuel use	Production at 31 enterprises that produce mainly briquets	All regions of the country	5,000,000 [2]
Petroleum:			
Crude	NGDU Rechitsaneft (Belneftekhim)	Rechitskoye, Ostashkovichskoye, Vishanskoye, Tishkovskoye, and Yuzhno-Ostashkovichskoye deposits, southeastern part of the country	2,000,000
Refined	OAO Mozyr NPZ (Government of Belarus, 42.7%, and Slavneft, 42.5%)	Homyel'skaya Voblasts'	10,000,000 [3]
Do.	OAO Naftan (Novopolotsk NPZ)	Vitsyebskaya Voblasts'	12,000,000 [3]
Potash	OAO Belaruskali (Belneftekhim)	Starobin deposit, Minskaya Voblasts'	5,500,000 [4]
Steel:			
Crude	Byelorussian Steel Works (BMZ) (Ministry of Industry)	Zhlobin, Homyel'skaya Voblasts'	2,600,000
Pipe	do.	do.	100,000
Rolled	do.	do.	2,300,000
Do.	OAO Mogilev Metallurgical Works [Byelorussian Steel Works (BMZ)]	Mahylyowskaya Voblasts'	120,000

[e]Estimated; estimated data are rounded to no more than three significant digits. Do., do. Ditto. NA Not available.
[1]N content of ammonia.
[2]Total peat for fuel use.
[3]Crude throughput.
[4]K_2O equivalent.