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The Mineral Industry of Belarus

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Belarus' mineral production enterprises included a potash mining company, three metallurgical steel plants, a nitrogen production enterprise, and two crude oil refineries. Belarus was the third-ranked country among the world's potash producers following Canada and Russia (Jasinski, 2013). 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.

In 2012, Belarus continued to depend on Russia for its domestic energy needs and for the supply of crude oil to operate its two refineries. The Government continued to work with Russia, and also to establish relationships with other countries that could serve as alternative energy sources for Belarus, and to modernize its domestic industry to diversify the domestic supply of and demand for energy products. Together, Belarus, Kazakhstan, and Russia formed a Customs Union, which means that the members do not impose protectionist customs duties on each other. As a result, Belarus was able to pay reduced prices for natural gas compared with the prices paid by nonmember countries. Belarus moved toward establishing closer working relationships with other countries (such as Azerbaijan, Turkmenistan, and Venezuela) that could supply oil and natural gas should Belarus need them. The country was also trying to diversify its domestic energy supply. In 2012, Belarus was in the early stages of building a new 2,400-megawatt (MW)-capacity nuclear powerplant in the Grodno region that was expected to become operational by 2018. The country was also ramping up domestic exploration for oil and shale gas. Because the new production lines of Belarusian cement plants work on coal, this would alleviate domestic demand for natural gas (Interfax.by, 2012i; 2013b).

Minerals in the National Economy

In 2012, the country's real gross domestic product (GDP) increased by 1.5%, and the nominal GDP amounted to $63.3 billion.[1] The industrial production of Belarus contributed 31.8% to the Republic's GDP, out of which the mineral sector accounted for 1.4%. The total value of industrial production increased by 5.7%. In 2012, the value of mineral industry output decreased by 2.0% compared with that of 2011; the combined value of metallurgical production and products made out of metal increased by 4.5%, and the value of nonmetal mineral products decreased by 3.1% compared with that of 2011 (National Bank of the Republic of Belarus, 2013; National Statistical Committee of the Republic of Belarus, 2013a, b).

The total value of foreign direct investment (FDI) in the Belarusian economy in 2012 was $10.4 billion, which was a 21.8% decrease compared with FDI in 2011. The mineral sector received only 1.0% of the total FDI. Russia provided 46.6% of all FDI in the Belarusian economy and was the main source of foreign investment in that year (National Statistical Committee of the Republic of Belarus, 2013b).

In 2012, Belarus exported $51.9 billion worth of goods and services and imported $49.0 billion. The main export category was mineral products, which accounted for 36.2% of the total export revenue. Other important export categories were chemicals (21.7%), equipment and machinery (17.9%), agricultural products and food (10.6%), and metals (5.5%), among others. The major export partner of Belarus was Russia, which received 35.4% of all exports, by value. It was followed by the Netherlands (16.5%), Ukraine (12.1%), Latvia (7.1%), Germany (3.8%), Lithuania (2.6%), and Poland (2.1%). The main import category was mineral products, which accounted for 39.4% of the total value of imports. It was followed by equipment and machinery (22.9%), chemicals (12.4%), metals (10.1%), and agricultural products and food (7.8%). The major import partner of Belarus was Russia, which supplied 59.3% of Belarus's goods and services imports, by value. Other significant import partners were Germany (5.9%), China (5.1%), Ukraine (5.0%), Poland (2.9%), and Italy (2.1%) (National Statistical Committee of the Republic of Belarus, 2013a, b).

Production

In 2012, Belarus increased production of all steel products except steel cord—output of steel pipes increased by 8.0% to 226,900 metric tons (t), and that of crude steel, by 3.24% to 2.87 million metric tons (Mt). Other minerals for which production increased included cement, the output of which increased by 6.6% to 4.9 Mt; refined petroleum, by 5.8% to 21.7 Mt; and sulfuric acid, by 4.0% to 936,000 t. At the same time, production of peat for horticultural use decreased by 36.2% to 269,000 t; potash, by 8.8% to 4.8 Mt in K_2O equivalent; steel cord, by 6.6% to 87,900 t; and peat for fuel use, by 5.1% to 2.7 Mt. Other production data are in table 1.

Structure of the Mineral Industry

Most of the mineral industry enterprises were consolidated under the State Concern for Oil and Chemistry, known as Belneftekhim. Belneftekhim included 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 together had

[1]Where necessary, values have been converted from Belarusian rubles (BYR) to U.S. dollars (US$) at an annual average exchange rate of BYR8,335.86=US$1.00 for 2012 and from euro area euros (€) to U.S. dollars (US$) at an annual average exchange rate of €0.809=US$1.00 for 2012.

a 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 could be privatized. The list included only smaller production facilities, however, and excluded all of the country's enterprises of national significance in terms of contribution to Belarus's GDP (Romanchuk, 2011).

In 2012, Belarus continued discussions with potential foreign investors concerning the sale of one of the flagship enterprises, such as Belaruskali or one of the country's petroleum refineries. The economic situation in Belarus, however, was much better than in the years since, and the focus of the discussions was on a potential sale of a minority share (between 10% and 25%) of Belaruskali. The Government stated that the true market value of Belaruskali was between $30 billion and $40 billion and said that it was not willing to sell a part of the company for a price corresponding to a lower total value. Negotiations and discussions with companies from Middle East countries, China, Europe, and India were reported, but as of yearend, no agreements had been reached (Interfax.by, 2012b–d, f).

Commodity Review

Metals

Iron and Steel.—The OAO Byelorussian Steel Works (BMZ) was the predominant producer of iron and steel in Belarus. In 2012, BMZ produced 2.7 Mt of steel, 2.2 Mt of rolled steel, 124,600 t of steel pipes, and 87,900 t of steel cord. Production of steel increased by 3.2% compared with that in 2011; rolled steel, by 1.2%; and steel pipes, by 6.3%. Production of steel cord, however, decreased by 6.6%. BMZ was a minimill that was originally built in 1984 and, as of 2012, employed 15,000 workers. In 2011, it was transformed from a Government enterprise into a corporation, but a 100% ownership was retained by the Government (OAO Byelorussian Steel Works, 2013).

In August, together with 13 other companies, BMZ became a part of a newly formed holding company named Belarusian Metallurgical Co. (BMK). BMZ was expected to serve as a managing company of BMK. Other companies that joined BMK were OJSC Rechitsa Metizny plant, JSC Mogilev metallurgical works, Minsk bearing plant, OJSC Belvtorchermet, OJSC Belcvetmet, OJSC NII Bearing, and OAO BelNIILIT. The main reason for the creation of the company was to achieve cost reduction through close cooperation among the enterprises in obtaining loans, as well as in logistics, marketing, personnel management, and research and development. BMK would have three divisions—metallurgical production, raw materials provision, and research and development (Interfax.by, 2012h).

In mid-2012, BMZ started construction of a new rolling mill. BMZ expected that, after the completion of the new mill, the company would be able to increase its rolled-steel output and start making new products, such as rolled steel designed for rebar production. The first stage of the project would result in a new mill with a production capacity of 700,000 metric tons per year (t/yr) of rolled steel; in the second stage, the production capacity would be increased to 1 million metric tons per year (Mt/yr). The project was being financed by the Eurasian Bank for Development (EABR) and OAO Belarusbank, which would provide $174.3 million and €176.5 million ($218.2 million), respectively. BMZ was expected to be able to export about 75% of the output from the new mill. The mill was planned to come online in December 2014 and to provide 200 new jobs at BMZ (Interfax.by, 2013a).

In December, Minsk Motor Works (MMZ), which was the only producer of diesel engines in Belarus, started construction of a new plant that would produce cast iron. The total cost of the project was expected to be $175 million, including $47.6 million for the cost of construction. After completion of the first stage of the project in 2014, the capacity of the new plant was expected to be 18,000 t/yr. By that time, the new plant would employ about 370 people. At the second stage, MMZ was planning to purchase and install additional equipment, including an automated line for the production of ingots. By the time that the second stage is completed in 2017, the total plant employment was expected to be 930 workers. MMZ was planning to use cast iron in its production of diesel engines. The total design capacity of the new plant was planned to be 50,000 t/yr of cast iron (Interfax.by, 2012e).

Industrial Minerals

Cement.—In 2012, Belarusian cement plants produced 4.91 Mt of cement, which was a 6.6% increase compared with the 2011 production level. Belarus had three main cement producers—OAO Belarusian Cement Plant (BCZ), which was also known as the Kostyukovichi cement plant; OAO Krasnoselskstroymaterialy, which was also known as the Volkowysk cement plant, and OAO Krichevtsementnoshifer (Ernst & Young, 2013).

In July 2007, the Belarusian Government made a decision to increase the production capacity of its cement plants by more than 5 Mt/yr. In particular, the Government planned to build a new production line with production capacity of 1.8 Mt/yr at each of the three plants. As a result, the total capacity of all Belarusian cement plants was expected to double. The new lines were designed to use dry cement production technology that had not been used before in Belarus. In addition, a decision was made to switch the existing production lines from natural gas to coal as the primary energy source, which would reduce production costs and, ultimately, the cost of cement. China International Trust and Investment Corp. (CITIC) obtained a contract to build all three plants. Although the construction of all three plants was delayed, reportedly because of quality and technological issues with the equipment being installed, the first line (at Krasnoselsk) came online in April and the second one (at BCZ) became operational in July. The new line in Krichev was expected to be commissioned in June 2013 (Interfax.by, 2012j).

In January, the Government announced that it had decided to compensate all three cement plants for a portion of interest paid on loans that were taken out for construction of the new plants. For the loans taken out in Belarusian rubles, compensation would amount to 50% of the current refinancing rate offered by the National Bank of Belarus. For the loans taken out in foreign currency, the Government offered compensation in the amount of 50% of the actual rate at which the loans were taken.

The funds paid as compensation were to be used for investment projects undertaken by the cement plants (Interfax.by, 2012g).

By 2014, when all enterprises were projected to produce cement at levels close to capacity, total production of cement in Belarus was expected to reach about 9.2 Mt. Domestic demand for cement in the country was somewhere between 4 and 5 Mt/yr, and Belarus would export the rest of the output, primarily to Russia. The cement plants were planning to create a cement holding company that would focus its activity on marketing and logistics involved in exporting about 5 Mt of the plants' output (TUT.by, 2012).

Potash.—OAO Belaruskali was one of the world's leading producers of potash fertilizers and had a 15% share of the world market. In 2012, the production of potash in Belarus decreased to about 4.84 Mt of potash in K_2O equivalent, or by 8.8%. Historically, potash was the leading export product from Belarus. In 2012, however, the export of potash fertilizers decreased by 21.9%, and the revenue from potash exports decreased by 17.9% to $2.7 billion. Only 55.7% of the potash produced was exported compared with 88.5% in 2011. Belaruskali was planning to increase production in 2013 by between 10% and 13% from the 2012 production level (Mineral.ru, 2013; OAO Belaruskali, 2013).

Belaruskali's Starobin potash deposit 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. In July, Belaruskali started operations at the Beryozovskiy section of the deposit, which increased the total annual capacity to 10.3 Mt/yr from 8.8 Mt/yr in 2011. The company was planning to further increase the capacity of the Beryozovskiy section further in 2014. Belaruskali's total capacity to produce potash fertilizers was expected to reach 11 Mt/yr by 2015 (Mineral.ru, 2012a, b; OAO Belaruskali, 2013).

In 2011, the Government held a tender for development of the Petrikovskoye potash salts deposit, which is located in the Gomel region and had proven resources of 236 Mt in K_2O equivalent. Belaruskali was named the winner of the tender but was required to find an investor to form a public company, with the Government's share set at a minimum of 25%. During 2012, the position of Belaruskali with respect to selecting the investor had changed. In July, Belaruskali was about to start accepting applications from prospective co-investors and was finishing up the detailed description of the investment project. In October, however, the decision was made that Belaruskali would be able to develop the deposit using a combination of its own funds and loans. In October, the Government issued a decree that amended the results of the 2011 tender and relieved Belaruskali from the obligation to bring in a foreign investor to develop the Petrikovskoye deposit. Preliminary construction work was expected to begin in 2013; mining of the deposit was expected to start in December 2019. The mine was expected to reach its full planned capacity by December 2021 (Interfax.by, 2012a).

During 2012, Belaruskali and its Russian counterpart, OAO Uralkali, were discussing the creation of a joint trading company, Soyuzkali. Before 2012, ZAO Byelorusskaya Kaliynaya Kompaniya (BKK) was the primary trader of Belarusian and Russian potash fertilizers on the international market, and it held a 43% share of world potash exports. Soyuzkali would be registered in Switzerland, and Uralkali and Belaruskali would each have a 50% share in the new company. Both parties saw potential benefits from rebranding and restyling of the BKK, primarily because the new company would have access to less expensive loans. Also, it was expected that the new trading company would take on additional functions of trading nitrogen and phosphorus fertilizers. Soyuzkali was expected to be registered in the beginning of 2013 and to start trading by the middle of the year (Mineral.ru, 2012c).

Outlook

Belarus is expected to continue to be a major supplier of potash to world markets and to develop additional mines in the Starobin and Petrikovskoye deposits. In 2013, it is also likely to become a regional exporter of cement. Although Belarus did not sell any of its flagship state enterprises in 2012, Belarus still may decide to sell some of them, such as Belaruskali, BMZ, Grodno Azot, and the Mozyr NPZ and Naftan refineries, in the future, depending on the country's financial situation. If some of those facilities are privatized, the direction of enterprise development may be affected. After the sale of its Beltransgaz pipeline to OAO Gazprom in 2011, the Belarusian Government has secured for the country advantageous natural gas prices that will likely provide some stability to the country's overall economy for the next few years. 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 Commonwealth of Independent States community.

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TABLE 1
BELARUS: PRODUCTION OF MINERAL COMMODITIES[1]

(Thousand metric tons unless otherwise specified)

Commodity[2]		2008	2009	2010	2011	2012
METALS						
Steel:						
Crude		2,660	2,449	2,672	2,779	2,869
Rolled		2,387	2,299	2,458	2,457	2,596
Pipes	metric tons	145,000	107,400	183,200	210,100	226,900
Cord	do.	96,500	68,900	92,900	94,100	87,900
INDUSTRIAL MINERALS						
Cement		4,219	4,350	4,531	4,604	4,906
Lime		900	787	805	741	719
Nitrogen, N content of ammonia	metric tons	743,400	828,600	835,900	803,900	815,200
Potash, K_2O equivalent		4,968	2,485	5,223	5,306	4,840
Salt[3]	metric tons	1,476,000	1,695,100	1,700,000	1,700,000 [e]	1,700,000 [e]
Sulfuric acid		857	833	891	900 [e]	936
MINERAL FUELS AND RELATED MATERIALS						
Natural gas	million cubic meters	203	205	213	222	218
Peat:						
Horticultural use		395	272	241	422 [r]	269
Fuel use		2,361	2,216	2,352	2,823 [r]	2,679
Total		2,756	2,488	2,593	3,245 [r]	2,948
Petroleum:						
Crude		1,740	1,720	1,700	1,682	1,660
Refined		21,305	21,634	16,455	20,474	21,668

[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 September 5, 2013.
[2]In addition to the commodities listed, Belarus had also produced dolomite and synthetic diamond, but available information is inadequate to make reliable estimates of output.
[3]Includes byproduct salt from potash production.

TABLE 2
BELARUS: STRUCTURE OF THE MINERAL INDUSTRY IN 2012

(Metric tons)

Commodity	Major operating companies and major equity owners	Location of main facilities	Annual capacity[e]
Cement	OAO Krasnoselskstroymaterialy	Hrodzyenskaya Voblasts'	2,700,000
Do.	OAO Krichevzementnoshifer	Mahylyowskaya Voblasts'	1,800,000
Do.	OAO Belarusian Cement Plant (BCZ)	do.	2,900,000
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, 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'	6,300,000 [4]
Steel:			
Crude	OAO Byelorussian Steel Works (BMZ) (Government, 100%)	Zhlobin, Homyel'skaya Voblasts'	2,700,000
Pipe	do.	do.	125,000
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.