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The Mineral Industry of the Czech Republic

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In 2012, the Czech Republic was estimated to have been the 4th-ranked producer of kaolin in the world, the 11th-ranked producer of feldspar, and the 27th-ranked producer of crude steel, by tonnage. The country was estimated to have accounted for approximately 11% of the world's production of kaolin; of feldspar, slightly greater than 2%; bentonite, slightly greater than 1%; and industrial (silica) sand, about 1%. Coal, coke, and steel were the mineral commodities that were most significant to the country's domestic and regional markets. The Czech Republic was a significant Central European producer of heavy industrial goods manufactured by the country's chemical, machine building, and toolmaking industries. The production of coal for thermal powerplants and the use of nuclear power were significant sources of electricity and helped the country maintain a lower level of dependence on imported natural gas for electricity production than other countries in Central and Eastern Europe. Other mineral commodities produced in the country included cement, common sand and gravel, dolomite, garnet, gypsum, natural gas, and uranium (table 1; Czech Geological Survey, 2012, p. 90–91; Dolley, 2013; Tanner, 2013; Virta, 2013; World Steel Association, 2013b, p. 9).

Minerals in the National Economy

Based on estimated data from the Czech Statistical Office, the value added by the mining and quarrying sector contributed about 1.04% (about $2 billion[1]) to the country's gross domestic product (GDP) in 2012 compared with 1.21% ($2.6 billion) in 2011. In 2005 prices, the real value added by the sector decreased by 3% in 2012 compared with that of 2011, after decreasing by 7% in 2011 compared with that of 2010. In 2012, the average number of employees in the mining and quarrying sector was estimated to be about 43,300 compared with an average of about 46,500 employees in 2011, and the sector accounted for about 1% of the total number of employees in the Czech Republic, on average, during both years (Czech Statistical Office, 2013b; International Monetary Fund, 2013).

If converted to current U.S. dollars, the estimated value of the mineral industry trade balance (including trade in metal scrap and intermediate manufactured mineral products, such as cement, crude steel, and manufactured gas) for the Czech Republic was –$12.5 billion in 2012 compared with –$12.9 billion in 2011. This 3% reduction in the mineral trade deficit took place despite an estimated decrease in the value of the country's mineral industry exports to about $15.4 billion from $16.6 billion in 2011 because of a greater decrease in the value of imports of mineral industry products to about $27.9 billion from $29.5 billion in 2011. In Czech koruna, the estimated value of this same mineral industry trade deficit actually expanded by about 7.2% because the estimated value of imports of mineral industry products increased by about 4.8%. The reason for this discrepancy is that the estimated annual average nominal exchange rate changed significantly (by about 10.7%) during this timeframe (as described in footnote 1). In 2012, the three leading mineral product categories with respect to the Czech Republic's import expenditure were petroleum, petroleum products, and related materials ($8.4 billion), iron and steel ($6.9 billion), and gas, natural and manufactured (about $5.1 billion); the three leading mineral industry exports by the country were iron and steel (about $5.5 billion), nonmetallic mineral manufactures (about $2.8 billion), and petroleum, petroleum products, and related materials (about $1.7 billion). In 2012, mineral industry products accounted for about 20% of the total value of Czech goods imports and about 10% of the total value of the country's exports of goods (Czech Statistical Office, 2013a; International Monetary Fund, 2013).

Government Policies and Programs

Three main laws are applicable to the mineral industry in the Czech Republic. Act No. 44/1988 on the Protection and Use of Mineral Resources (the Mining Act), as amended, defines the minerals that are owned by the Government, establishes the authority of certain Government agencies with respect to mining activity, and sets out other rules on the management of mineral resources in the Czech Republic. The Czech National Council Act No. 62/1988 on Geological Work (the Geological Act), as amended, establishes the rules for prospecting and exploration of most mineral deposits. Act No. 61/1988 on Mining Operations, Explosives and on the State Mining Administration, as amended, defines appropriate mining methods. The Ministry of the Environment enforces environmental laws in the mining sector and has the authority to revoke exploration and mining leases if environmental laws are violated (Czech Geological Survey, 2012, p. 27–34).

In 1991, the Czech Government passed Government Resolution No. 444/1991, which established geographic limits on the expansion of coal and uranium mining. It was estimated that about 750 million metric tons (Mt) of brown coal reserves as well as some uranium reserves were located in areas where mining is restricted. A national energy policy document known as the State Energy Concept (SEC), which is a document with a 30-year outlook, was approved by Government Decision no. 211 and became the State Energy Policy on March 10, 2004. The SEC had been reviewed twice by the Ministry of Industry and Trade (MIT) before it was approved. The SEC 2004 included the following priorities: decrease the intensity of primary energy supplied (for domestic use) relative to the GDP [measured by the ratio of total primary energy supply (TPES) to GDP], maintain the current level of TPES, and comply with binding European Union emission limits in 2010. In 2009, the MIT prepared an updated draft of the SEC, which included

[1]Where necessary, values have been converted from Czech koruna (CZK) to U.S. dollars (US$) at an annual average exchange rate of about CZK17.7=US$1.00 for 2011 and CZK19.6=US$1.00 for 2012. All values are nominal, at current prices, unless otherwise stated.

the following strategies: achieve a balanced energy mix, with preferential use of all domestic energy resources, and maintain excess production of electricity; improve energy efficiency and reduce energy intensity, particularly in the building sector; increase energy security and the ability of the country to respond to energy supply disruptions; and minimize the effects of energy use on the environment. The update of the SEC was still being debated by the Government at the end of 2012, and it had asked for a strategic impact assessment of the update to the SEC before final approval (Ministry of Industry and Trade, Czech Republic, 2004, p. 1–9; Czech Coal Group, 2010, p. 75; International Energy Agency, 2010, p. 22–23, 45; Czech Geological Survey, 2012, p. 74–80, 87–92; Weiler, 2012; OECD Nuclear Energy Agency, 2013).

Production

In 2012, production of most minerals and materials used intensively in construction decreased significantly from that of 2011, including production of cement (–10%); feldspar substitutes, including for glass manufacturing (–32%) and glass sand (–13%); common sand and gravel (–12%); crude steel (–9%); and various forms of stone (between –12% and –32%). The production of other minerals used intensively in construction increased significantly during this same timeframe, however, including gypsum (+27%) and dolomite (+19%). In 2011, many state-funded construction projects were started that had been delayed because of adverse weather conditions in 2010, and housing construction also recovered from a down year in 2010. In 2012, however, there appeared to be a limited number of state-funded construction projects, and investors stopped preparation of infrastructure construction projects as repair and reconstruction funds became more limited and the policy priorities of the Czech Transportation Ministry became less clear (table 1; Czech Geological Survey, 2012, p. 51; International Cement Review, 2012a, b)

In 2012, changes in production of other industrial minerals were also mixed. Production of bentonite increased by 38% compared with that of 2011, and production of foundry sand increased by slightly greater than 24%. Production of gemstone-bearing rock decreased by between 29% and about 37% from that of 2011, however, and production of silica minerals decreased by 29%. Information was not available regarding the main causes of these disparate changes in industrial mineral production. In 2012, mine output of uranium decreased by about 12% compared with that of 2011 as a result of a continuing Government program to phase out uneconomic mining of uranium in the Czech Republic (table 1; Czech Geological Survey, 2012, p. 45–54, 74–76, 101–103).

Structure of the Mineral Industry

Table 2 is a list of major mineral industry facilities. In 2012, the only state-owned mining company that remained in the Czech Republic was DIAMO s.p., and even DIAMO was not intended to be a mining company. Rather, DIAMO was intended to coordinate and administer the ongoing remediation activities to restore the properties of former state-owned mines that are no longer producing. In 2012, DIAMO still produced some mined uranium, in addition to its remediation activities (Czech Geological Survey, 2012, p. 74–76, 101–103).

Commodity Review

Metals

Iron and Steel.—In 2012, the Czech Republic had no economically exploitable iron ore deposits and imported all iron ore products used in primary steel production; the country imported about 5.9 Mt of iron ore and concentrate compared with about 7.4 Mt in 2011. In 2011, ArcelorMittal Ostrava a.s. had reportedly laid off about 700 employees, and Evraz Vitkovice Steel a.s., 200, in order to decrease production more efficiently in 2012. The Czech Steel Federation anticipated that demand for steel from the construction sector would not recover until sometime in 2013, at the earliest (Czech Geological Survey, 2012, p. 201; World Steel Association, 2013a, p. 100; Czech Steel Federation, undated).

Industrial Minerals

Cement.—In 2012, production of cement in the Czech Republic decreased by about 400,000 t from that of 2011; this was very similar to the decrease in domestic consumption of cement by 370,000 t during the same timeframe. Coal was the leading fuel used in cement production in the country and accounted for about 44% of total fuel consumption for cement production, followed by other solid fuels (22.6%), biomass (20.6%), and used tires (7.6%); the remainder was accounted for by the use of liquid fuels, including heavy fuel oil and natural gas (Czech Cement Association, 2013).

Mineral Fuels and Related Materials

Uranium.—DIAMO remained the only domestic producer of uranium, and it supplied CEZ a.s. (the owner of the Czech Republic's two nuclear powerplants) with about one-third of the uranium it required. All domestically produced uranium was sent to Russia for processing into fuel. All nuclear fuel for the Dukovany Nuclear Power Station was purchased from the Russian firm OAO TVEL, whereas the Temelin Nuclear Power Station obtained its fuel from Westinghouse Electric Company LLC of the United States. CEZ's nuclear powerplants accounted for about 35% of all electricity in the Czech Republic in 2012 (CEZ a.s., 2013, p. 102–104; Czech Geological Survey, 2012, p. 101–103).

Outlook

Economic activity in the Czech Republic is expected to increase gradually during 2013 as external conditions improve. Dependence on imports of natural gas and petroleum is likely to continue to affect the trade balance negatively, but production of coal is likely to remain stable and to provide a significant portion of fuel for electricity generation (International Monetary Fund, 2012a, p. 1, 5; 2012b, p. 199).

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TABLE 1
CZECH REPUBLIC: PRODUCTION OF MINERAL COMMODITIES[1]

(Thousand metric tons unless otherwise specified)

Commodity[2]		2008	2009	2010	2011	2012
METALS						
Aluminum, metal, secondary		47	27 r	40 r	50 r	50 e
Iron and steel, metal:						
Pig iron		4,737	3,483	3,987	4,137	3,936
Steel, crude		6,387	4,594	5,180	5,583	5,072
Semimanufactures, hot-rolled products		5,286 r	3,957	4,625 r	4,616 r	4,276
Lead, metal, secondary		36	29	30	32	30 e
INDUSTRIAL MINERALS						
Cement, hydraulic		4,805 r	3,851 r	3,559 r	4,053 r	3,650 e
Clays:						
Bentonite		235 r	177	183	160	221
Brick clays and related materials		2,756	2,215	1,836	1,943	1,851
Kaolin, raw		3,833	2,886	3,493	3,606	3,318
Other		574	377	429	499	484
Diatomite		31	--	32	46	43
Dolomite		449	337	385	369	440
Feldspar		488	431	388	407	445
Feldspar substitutes, including nepheline syenite		36	23	19	22	15
Gemstones, crude:						
Moldavite-bearing rock		177	104	103	117	74
Pyrope-bearing rock		24	26	23	17	12
Graphite		3	--	--	--	--
Gypsum and anhydrite, crude		35	13	5	11	14
Lime, hydrated and quicklime		1,150	946 r	1,032 r	1,057 r	1,000 e
Nitrogen, N content of ammonia		175 r	173 r	160 r	189 r	200 e
Sand and gravel:						
Common sand and gravel		27,306	23,974	19,240	21,424	18,785
Foundry sand		702	374	473	395	491
Glass sand		1,151	990	888	976	849
Silica minerals, including quartz and quartzite		18	16	14	24	17
Stone:						
Crushed		44,277	41,307	37,270	36,717	32,535
Dimension		723	710	823	648	504
Limestone and other calcareous stones		11,465	9,488 r	9,828	11,244	9,858
Sulfur, byproduct, all sources[e]		45	40	40	40	40
Sulfuric acid		215	253 r	195 r	258 r	200 e
MINERAL FUELS AND RELATED MATERIALS						
Coal:						
Bituminous		12,197	10,621	11,193	10,967	10,796
Brown and lignite		47,872	45,616	43,931	46,848	43,710
Total		60,069	56,237	55,124	57,815	54,506
Coke, from coke ovens		3,399	2,295 r	2,548 r	2,588 r	2,350 e
Fuel briquets from brown coal[e]		156 [3]	150	140 r	150	140
Gas:						
Manufactured, all types[e]	million cubic meters	1,442 [3]	1,000	1,500	1,500	1,500
Natural, marketed	do.	168	180	201	187	204
Petroleum:						
Crude[4]	thousand 42-gallon barrels	1,600	1,470 r	1,173 [3]	1,105 [3]	1,020
Refinery products[e, 5]	do.	58,000	52,000	58,000	53,000	55,000 e
Uranium:						
Mine output, U content	metric tons	290	286	259	252	222
U_3O_8 content[e]	do.	342	337	305	297	262
Concentrate production, U content	do.	261	243	237	216	219

[e]Estimated; estimated data are rounded to no more than three significant digits. [r]Revised. do. Ditto. -- Zero.

[1]Table includes data available through February 11, 2014.

[2]In addition to the commodities listed, ferrovanadium, secondary copper, secondary gold recovered from scraps, precious metals, and zinc metal may have been produced, but available information is inadequate to make reliable estimates of output.

[3]Reported figure.

[4]Figures were converted to barrels from production reported in thousand metric tons, as follows: 2008—236; 2009—217 (revised) ; 2010—173; 2011—163; and 2012—150.

[5]Estimated based on throughput reported in million metric tons, as follows: 2008—8.25; 2009—7.38; 2010—8.70 (estimated); and 2011—7.57 (estimated).

TABLE 2
CZECH REPUBLIC: STRUCTURE OF THE MINERAL INDUSTRY IN 2012

(Thousand metric tons unless otherwise specified)

Commodity	Major operating companies and major equity owners	Location of main facilities	Annual capacity
Aluminum, secondary	Alcan Decin Extrusions s.r.o.	Decin, northern Bohemia	NA
Do.	Kovohute Holdings DT- Mnisek Division (majority owned by Demonta Trade SE)	Mnisek pod Brdy	NA
Bentonite	KERAMOST a.s.	Most	NA
Do.	Sedlecky Kaolin a.s.	Bozicany	NA
Cement	Cement Hranice a.s. (Dyckerhoff AG, 100%)	Hranice	1,100
Do.	Ceskomoravsky Cement a.s. (HeidelbergCement AG, 100%)	Mokra	1,400 [e]
Do.	do.	Radotin	800 [e]
Do.	Holcim (Cesko) a.s. (Holcim Ltd., 100%)	Prachovice	1,200
Do.	Lafarge Cement a.s. (Lafarge S.A., 70%, and STRABAG SE, 30%)	Cizkovicka	1,200
Clay	LB Minerals s.r.o.	Horni Briza	NA
Do.	KERAMOST a.s.	Most	NA
Do.	Ceske Lupkove Zavody a.s.	Nove Straseci (refractory clay)	NA
Do.	P-D Refractories CZ a.s.	Velke Opatovice (refractory clay)	NA
Do.	RAKO-LUPKY s.r.o.	Lubna u Rakovnika	NA
Do.	Kaolin Hlubany a.s. (WBB Minerals, 94%)	Podborany	NA
Coal:			
Bituminous	OKD a.s. (New World Resources N.V.)	4 mines near Ostrava and Kravina in eastern Czech Republic	13,000 [e]
Brown	Dul Kohinoor a.s. (Czech Coal Group)	Centrum Mine in Marianske Radcice	350 [e]
Do.	Litvinovska uhelna a.s. (Czech Coal Group)	CSA Mine near Most	5,000 [e]
Do.	Severoceske doly a.s. (CEZ Group a.s., 100%)	Nastup Tusimice Mine southwest of Chomutov and Bilina Mine in Bilina	23,000 [e]
Do.	Sokolovska uhelna a.s.	Jiri and Druzba Mines at Sokolov	10,000 [e]
Do.	Vrsanska uhelna a.s. (Czech Coal Group)	Vrsany Mine just west of Most (contains the Vrsany and the Sverma sites)	10,000 [e]
Lignite	Lignit Hodonin s.r.o.	Hodonin, south of Moravia	500
Coke	ArcelorMittal Ostrava a.s.	Ostrava	1,500
Do.	OKK Koksovny a.s. (New World Resources N.V.)	Jan Sverma coking plant near Ostrava	400
Do.	do.	Svoboda coking plant near Ostrava	600
Do.	Trinecke Zelezarny a.s. (Moravia Steel a.s., 69%)	Trinec	700
Feldspar	LB Minerals s.r.o.	Horni Briza	NA
Do.	KMK Granit a.s.	Krasno	NA
Do.	Druzstvo DRUMAPO	Nemcicky	NA
Do.	Ceske sterkopisky spol. s.r.o.	Prague	NA
Do.	AGRO Brno - Turany a.s.	Brno	NA
Feldspar substitutes (including nepheline phonolite and syenite)	KERAMOST a.s.	Most	NA
Ferrovanadium	Nikom a.s. (Evraz Vitkovice Steel a.s.)	Vitkovice-Ostrava	NA
Gold, metal, secondary	Kovohute Pribram Nastupickna a.s.	Pribram	NA
Graphite	Grafitove doly Stare Mesto s.r.o.	Stare Mesto	NA
Kaolin	KERAMOST a.s.	Most	NA
Do.	Sedlecky Kaolin a.s.	Bozicany	NA
Do.	LB Minerals s.r.o.	Horni Briza	NA
Do.	Kaolin Hlubany a.s.	Podborany	NA
Do.	KSB s.r.o.	Bozicany	NA
Lead, metal, secondary, refined	Kovohute Pribram Nastupickna a.s.	Pribram	30
Natural gas million cubic meters	Gasfield operators in Brno and Ostrava regions, including: Moravske Naftove doly a.s. Ceska Naftarska Spol s.r.o. Green Gas DPB a.s. UNIGEO a.s.	Eastern/Southeastern Czech Republic, of which: Hodonin do. Paskov Ostrava-Hrabova	200 [e, 1]

See footnotes at end of table.

TABLE 2—Continued
CZECH REPUBLIC: STRUCTURE OF THE MINERAL INDUSTRY IN 2012

(Thousand metric tons unless otherwise specified)

Commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity
Petroleum:				
Crude	thousand 42-gallon barrels	Oilfield operators around Hodonin, including: Moravske Naftove doly a.s. Ceska Naftarska Spol s.r.o. UNIGEO a.s.	Location: Hodonin do. Ostrava-Hrabova	2,100 [e, 1]
Refinery	thousand 42-gallon barrels per day	Paramo a.s. (Unipetrol a.s.)	Refineries at Kolin and Pardubice	20 [e]
Do.	do.	Ceska Rafinerska (Unipetrol a.s., 51.2%, Eni International B.V., 32.5%, Shell Overseas Investments B.V., 16.3%)	Refineries at Litvinov and Kralupy nad Vltavou	165 [e]
Pig iron		ArcelorMittal Ostrava a.s. (ArcelorMittal, 100%)	Kunice-Ostrava	3,000
Do.		Trinecke Zelezarny a.s. (Moravia Steel a.s., 69%)	Trinec	2,100
Sand, industrial (glass and foundry)		Provodinske pisky a.s.	Provodin	NA
Do.		Sklopisek Strelec a.s.	Mladejov	NA
Do.		LB Minerals s.r.o.	Horni Briza	NA
Do.		Kalcit s.r.o.	Brno	NA
Do.		SEDOS doprava a.s.	Drnovice	NA
Do.		PEDOP s.r.o.	Lipovec	NA
Do.		SETRA s.r.o.	Brno	NA
Steel, crude		ArcelorMittal Ostrava a.s. (ArcelorMittal, 100%)	Kunice-Ostrava	3,000
Do.		Evraz Vitkovice Steel a.s.	Vitkovice-Ostrava	950
Do.		Pilsen Steel s.r.o. (OAO OMZ)	Plzen	150 [e]
Do.		Poldi Hutte s.r.o. (Scholz Edelstahl A.G.)	Kladno	120
Do.		Trinecke Zelezarny a.s. (Moravia Steel a.s., 69%)	Trinec	2,440
Do.		Vitkovice Heavy Machinery a.s.	Vitkovice-Ostrava	200
Do.		Zelezarny Hradek a.s. (Z-Group Steel Holding)	Hradek	NA
Do.		Zelezarny Veseli, a.s. (Z-Group Steel Holding)	Veseli nad Moravou	NA
Do.		Zelezarny Chomutov s.p. (Z-Group Steel Holding)	Chomutov	NA
Do.		ZDB Group a.s.	Bohumin	40 [e]
Uranium, U content	metric tons	DIAMO s.p. (Government, 100%)	Rozna I Mine at Dolni Rozinka	500

[e]Estimated. Do., do. Ditto. NA Not available.
[1]Annual capacity listed is total for all deposits, mines, and companies that produce the commodity.