



2012 Minerals Yearbook

SLOVENIA

THE MINERAL INDUSTRY OF SLOVENIA

By Harold R. Newman

Slovenia's output of mineral commodities was not significant on either a world or a regional scale. The country continued to be an importer of most mineral commodities, including mineral fuels, ferrous and nonferrous ores and metals, and other mining and quarrying products. In 2012, Slovenia's main export partners were Germany (20%), Italy (12%), Austria (7.9%), and Croatia (6.2%). The country's main import partners were Italy (16.5%), Germany (16.3%), Austria (10.4%), and Croatia (4.8%). The United States was the leading non-European trading partner. In 2012, Slovenia's gross domestic product (GDP) based on purchasing power parity was \$58.9 billion compared with the \$58.3 billion in 2011. Mining and quarrying accounted for only 0.4% of the GDP, and the manufacture of basic metals accounted for 0.5% of the GDP (U.S. Central Intelligence Agency 2013).

In 2012, the United States exported goods valued at \$308 million to Slovenia, including fuel oil valued at \$57.5 million, metallurgical-grade coal (\$53.6 million), other coal and fuels (\$18.3 million), and other petroleum products (\$3.7 million) (U.S. Census Bureau, 2012a). The United States imported goods valued at \$562 million from Slovenia, including semifinished iron and steel mill products valued at \$49.4 million, aluminum and bauxite (\$17.4 million), finished metal shapes (\$7.7 million), and advanced iron and steel manufactures (\$2.2 million) (U.S. Census Bureau, 2012b).

The two primary laws that govern energy and natural resources in Slovenia are the Energy Act of 2008 and the Mining Act of 2011, respectively. The Mining Act regulates the exploration for, exploitation of, and management of mineral resources; mine closures; and health and safety issues in mining-related works. Mineral resources are defined by the Government as nonrenewable natural resources that are owned and licensed by the Government and are directly or indirectly economic to exploit. Energy is regulated by the Energy Act of 2008 and applies to legal entities and persons that perform a variety of activities in the energy field (International Law Office, 2012).

The Geological Survey of Slovenia (GeoZS) is a research institute established by the Government. Geologic data are fundamental for decisionmaking in the mineral sector. The main purpose of the GeoZS is to provide this geologic expertise and information about the geology of Slovenia. The GeoZS has the following six research departments: Environmental Geology and Geochemistry; Geological Maps; Groundwater; Mineralogy and Petrology; Mineral Resources; and Paleontology, Sedimentary, and Stratigraphy (Geological Survey of Slovakia, 2012).

Production

The production of Slovenia's mineral commodities depended on the demand for them, and the world financial crisis continued to affect the demand for these mineral commodities. No base-metal or precious-metal mining was conducted in Slovenia in 2012.

Production of bentonite, coal, crude steel, and natural gas decreased whereas production of petroleum increased (table 1).

Structure of the Mineral Industry

The major mineral industry facilities that were operating in Slovenia in 2012 and their respective locations and capacities are listed in table 2.

Commodity Review

Metals

Aluminum.—Talum Aluminium Ltd. was formed on January 1, 2011, from two former units of Talum d.d. Kidricevo (DE and DE Anode Analysis) after the parent company was reorganized. In 2012, Talum Aluminum produced primary aluminum along with billets, castings, and discs using raw materials imported from Birac AD of Bosnia and Herzegovina. The company produced all major types of aluminum alloys using alloying elements of copper, magnesium, manganese, and silicon. Talum sold its output in Slovenia through a network of warehousing and distribution centers across the country (Emerging Markets Information Service, 2012).

Iron and Steel.—Slovenska Industrija Jekla d.d. (SIJ) [Slovenian Steel Group] was composed of 14 metallurgical enterprises. The two principal enterprises were Acroni Jesenice d.o.o. and Metal Ravne d.o.o. Acroni was the leading steel company in Slovenia, and its electric arc furnace was capable of melting 85 metric tons per hour (t/hr) of steel using iron- and nickel-containing scrap as the principal source of raw materials. Acroni's main products were flat steel products and construction steel plates. Metal Ravne manufactured long-steel products, including high-speed steel, construction steel, and tool steel products (Industrial Metallurgical Holding Management Co., 2012).

Industrial Minerals

Cement.—The Salanit Anhovo d.o.o. cement works was the leading cement producer in Slovenia. The company also produced lime; products made from concrete, such as pipe and stone; and ready-mix concrete. Salanit invested significantly in the modernization of its entire production plant. The purpose of the €75 million (\$103 million¹) modernization project, which was completed in 2011, was to increase production capacity, reduce energy consumption per production unit, and update environmental protection measures. Also, the project laid the basis for increased use of alternative fuels in the future (Wietersdorfer Gruppe, 2012).

¹Where necessary, values have been converted from euro area euros (€) to U.S. dollars (US\$) at an average annual exchange rate of €0.72=US\$1.00.

Mineral Fuels and Related Materials

Coal.—Resources of brown coal, including lignite, were estimated to be 1,174 million metric tons (Mt), and reserves were estimated to be about 144 Mt. Brown coal was mined from the Rudnik Trbovlje Hrastnik (RTH) Mine and used by the TET Trbovlje powerplant. Lignite coal was mined from two deposits located at Trbovlje and Velenje, respectively. The Velenje Mine, which has coal layers estimated to be 16 meters thick, was one of the leading coal mines in Europe. A major part of the Velenje Mine's output was used at the 779-megawatt Šoštanj powerplant, which was owned by Termoelektrarna Šoštanj (European Association of Coal and Lignite, 2012).

Natural Gas.—In midyear 2012, the Governments of Russia and Slovenia met to discuss the status of Russia-Slovenia cooperation in the energy sector and the terms and conditions for Russian gas supplies to Slovenia. A Slovenian company, South Stream Slovenia LLC, was established to deal with spatial planning, environmental impact assessment, and basic design work on the South Stream natural gas pipeline. Shareholding in the company was split on a parity basis between Gazprom OAO of Russia and Geoplin Plinovodi d.o.o. of Slovenia. Construction of the South Stream pipeline started at yearend 2012, and first supplies were expected to be transported through the pipeline by yearend 2015. Throughput of the pipeline was projected to reach 63 billion cubic meters per year (OAO Gazprom, 2012).

Outlook

Production of minerals and mineral products in Slovenia will likely continue to be modest. As a result, Slovenia is expected to remain dependent on mineral imports to satisfy its domestic requirements. The production of mineral commodities, mainly

aluminum and crude steel, is expected to depend mainly on demand from external trade partners. Exploration efforts for uranium have shown some positive results, and exploration is expected to continue.

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TABLE 1
SLOVENIA: PRODUCTION OF MINERAL COMMODITIES¹

(Metric tons unless otherwise specified)

Commodity ²	2008	2009	2010	2011	2012 ^c
METALS					
Aluminum:					
Primary	83,328	35,148	40,177	41,000 ^r	40,000
Secondary ^e	20,000	10,000	17,000	16,000	15,000
Iron and steel, metal:					
Crude steel from electric furnaces	642,000	430,000	606,000	648,000 ^r	632,000 ³
Semimanufactures	692,320	462,700	656,943	706,133	700,864 ³
Lead, refined, secondary ^c	15,000	14,000	14,000	12,000	10,000
INDUSTRIAL MINERALS					
Cement ^c	1,000	1,082 ^r	799 ^r	620 ^r	1,000
Clays: ^e					
Bentonite	130	130	135	168 ³	98 ³
Ceramic clay, crude	32,200	9,478	12,279	10,103 ³	12,000
Salt, all sources	535	2,924	590 ^r	4,291	5,684 ³
Sand and gravel	19,171	15,720	12,965	10,691 ^r	7,612 ³
Silica sands (quartz and quartzite) ⁴	353,983	326,636	253,866 ^r	230,908 ^r	300,000
Stone, excluding quartz and quartzite, crude:					
Aggregate	19,489	16,611	14,495	11,527	12,000
Chert	21,648	16,695	16,114	18,907	20,000
Crushed, dolomite and limestone	14,982	13,609	12,073 ^r	9,627 ^r	7,557 ³
Dimension ^c	15,000	15,000	14,000 ^r	16,000 ^r	15,000
MINERAL FUELS AND RELATED MATERIALS					
Coal:					
Brown coal	489	511	419	453	354 ³
Lignite	4,032	3,918	4,011	4,066	3,967 ³
Total	4,521	4,429	4,430	4,519	4,321 ³
Natural gas	2,610	2,575	6,675	2,489	1,616 ³
Petroleum, crude	1,170	994	1,561	1,762	2,093 ³

^cEstimated; estimated data are rounded to no more than three significant digits; may not add to totals shown. ^rRevised. do. Ditto.

¹Table includes data available through October 31, 2013.

²In addition to the commodities listed, common clay and lime also were produced, but available information is inadequate to make reliable estimates of output.

³Reported figure.

⁴In previous years, this commodity category was listed as "Quartz, quartzite, glass sand."

TABLE 2
SLOVENIA: STRUCTURE OF THE MINERAL INDUSTRY IN 2012

(Thousand metric tons)

Commodity	Major operating companies and major equity owners	Location of main facilities	Annual capacity
Aluminum, primary and secondary	Talum Aluminium Ltd. (Elektro Slovenija d.o.o., 80%)	Smelter at Kidricevo	120 ^c
Cement	Salonit Anhovo d.o.o. (Wietersdorfer Gruppe, 100%)	Plant at Anhovo	1,100 ^c
Do.	Lafarge Cement d.d. (Lafarge S.A., 56%, and European Bank for Reconstruction and Development, 44%)	Plant at Trbovlje	600
Coal:			
Brown	Rudnik Trbovlje-Hrastnik d.o.o. (RTH)	Mine Rudnik Trbovlje Hrastnik near Trbovlje	NA
Lignite	Premogovnik Velenje, d.d.	Mine at Velenje	NA
Ferroalloys, (ferromanganese, ferrosilicomanganese, and ferrosilicon)	OFZ a.s. (ArcelorMittal S.A., 100%)	Plant at Istebné	NA
Lead, metal, secondary	MPI-Reciklaza Metalurgija, plastika in inženiring d.o.o.	Refinery at Zerjav	35
Salt	SOLINE Pridelava soli d.o.o.	Salt pans at Secovlje and Strunjan	2
Steel, crude	Acroni Jesenice d.o.o. (OAO Koks., 55.4%, and Government, 25%)	Plant at Acroni	400
Do.	Metal Ravne d.o.o. (OAO Koks, 55.4%, and Government, 25%)	Plant at Ravne	130 ^c
Do.	Štore Steel d.o.o. (Unior d.d., 54%)	Plant at Štore	185 ^c

^cEstimated. Do. Ditto. NA Not available.