



2014 Minerals Yearbook

SLOVENIA

THE MINERAL INDUSTRY OF SLOVENIA

By Lin Shi and John R. Matzko

In 2014, Slovenia's output of mineral commodities was not significant on either a world or regional scale. The country's production of metals included aluminum, crude steel, and refined lead; that of industrial minerals included cement, clay, salt, sand and gravel, crushed stone, and dimension stone; and that of mineral fuels included coal, natural gas, and crude petroleum. Slovenia continued to import most mineral commodities to meet its mineral requirements, including mineral fuels, metallic and nonmetallic minerals and ores thereof, and other mining and quarrying products (table 1).

Minerals in the National Economy

Slovenia's 2014 gross domestic product (GDP) was valued at about \$50 billion, and the real GDP growth rate was 3% compared with -1.1% in 2013. The country's mining and quarrying output decreased by 4.2% in 2014 compared with that of 2013 (Statistical Office of the Republic of Slovenia, 2015a, b, 2016; World Bank, The, 2015).

Production

In 2014, Slovenia's production of dimension stone increased to 112,671 metric tons (t), or by 60% compared with that of 2013; bentonite, by 39% to 199 t; chert, by 33% to 15,340 t; crude petroleum, by 23% to 2,683 barrels; cement, by 16% to 1,326,000 t; and crushed dolomite and limestone, by 15% to 8,124,000 t. The country's lignite production decreased by 17% to 3,108,000 t compared with that of 2013; crude ceramic clay, by 12% to 162,405 t; natural gas, by 10% to 2.7 million cubic meters; and silica sands, by 8% to 207,381 t (table 1).

Structure of the Mineral Industry

The major mineral industry facilities that were operating in Slovenia in 2014 and their respective locations and capacities are listed in table 2. Ownership of the facilities was a mix of private enterprises and state ownership; there were no significant changes in ownership in 2014 compared with that in 2013 (tables 1 and 2).

Mineral Trade

Slovenia's total exports were valued at about \$31 billion in 2014 compared with about \$29 billion (revised) in 2013. The country's imports were valued at about \$29 billion in 2014 compared with about \$28 billion (revised) in 2013. The country both exported and imported coal and coke, lubricants, natural gas, and petroleum and petroleum products. The country's major export destinations were, by value of exports, Germany, which received about 19% of Slovenia's total exports; Italy, about 11%; Austria, about 9%; and Croatia, about 7%. The country's imports were mainly from Germany, which provided about 16% of Slovenia's total imports, by value; Italy, about 14%;

Austria, about 10%; and the Republic of Korea, about 5%. In 2014, Slovenia exported goods to the United States valued at about \$699 million, of which iron and steel mill products were valued at about \$61 million, and aluminum and bauxite were valued at about \$15 million. Slovenia imported goods from the United States valued at about \$301 million, of which fuel oil and other petroleum products were valued at about \$39.6 million, and iron and steel products were valued at about \$1.3 million (U.S. Census Bureau, 2016a, b; U.S. Central Intelligence Agency, 2016).

Commodity Review

Metals

Aluminum.—Talum Aluminij d.o.o., which was owned by Elektro Slovenija d.o.o. (ELES) (83.44% interest), was Slovenia's major primary aluminum and aluminum products producer. The company had an aluminum smelter in Kidricevo. In 2013 (the latest year for which data were available), Talum's aluminum production reached full capacity and the company produced 84,035 t of aluminum. In 2013, the company manufactured 139,314 t of final aluminum products and sold a total of 138,464 t of aluminum products. The company employed 1,079 people at the end of 2013 (Group Talum, 2014, p. 1–3, 6).

ELES was also the operator of the country's electricity transmission system. In late 2012, the Capital Assets Management Agency of the Republic of Slovenia approved ELES's guarantee to supply electricity to Talum from 2013 to 2015. On September 24, 2014, ELES formally took over the new supervisory control and data acquisition/energy management system (SCADA/EMS) produced by ABB Sweden. This new system enabled ELES to better control both domestic and neighboring power networks that are part of the European Network of Transmission System Operators (ENTSO-E), enabled the inclusion of new data sources, and the use of modern management functions, such as sharing subsidiary services, preparation of various forecasts, and automatic voltage regulation (Elektro Slovenija d.o.o., 2014, p. 14, 15, 29; 2015).

Iron and Steel.—Slovenska Industrija Jekla d.d. (SIJ) [Slovenian Steel Group] was the leading steel producer in Slovenia. SIJ consisted of five major components, including a steelworks division composed of Acroni Jesenice d.o.o. and Metal Ravne d.o.o.; a distribution and processing division; a scrap division; a semifinished- and finished-steel manufacturing division; and a management division. SIJ's value-added products included stainless sheet steel and tool sheet steel. In 2014, SIJ's crude steel production decreased by 0.4% to 466,835 t from 468,761 t in 2013. The production of cast steel also decreased by 0.4% to 467,000 t from 469,000 t in 2013; however, flat steel production increased by 0.4% and bar steel production increased by 9.8% in 2014. The changes in the company's steel production

were driven by market demands. In 2014, SIJ employed an average of 3,064 people during the year, compared with 3,120 in 2013 (SIJ Group, 2015, p. 19–21, 37–39).

Industrial Minerals

Cement.—Salonit Anhovo d.o.o. was the leading cement producer in Slovenia. The company produced standard cement and specialty cement suitable for use in the oil and gas industry, and it had a production capacity of about 1.5 million metric tons per year (Mt/yr). Lafarge Cement Ltd., which was a subsidiary of the Lafarge Group of France, had a production capacity of 0.6 Mt/yr at its Trbovlje plant. The company had a 38% share of the cement market in Slovenia in 2014. Both Salonit Anhovo and Lafarge Cement had invested in the modernization of their plants to comply with both the European Union's and Slovenia's laws on using the best available manufacturing techniques to improve energy efficiency and environmental standards (Wietersdorfer Gruppe, 2014; Lafarge S.A., 2015, p. 37; Salonit Anhovo d.d., 2016).

Mineral Fuels and Other Sources of Energy

In 2014, Slovenia produced about 3.1 million metric tons (Mt) of lignite. In September, production of electricity at the coal-fired Trbovlje thermoelectric powerplant ceased for economic reasons. In 2014, Slovenia produced 5% more primary energy than in 2013. Energy was supplied by multiple sources in 2014, and included petroleum energy (33%), nuclear energy (24%), renewable energy (19%), coal (15%), and natural gas (9%). The country met 56% of its domestic energy demand with its own energy resources. Hydroelectric generation was at a record high in 2014 and produced 32% more electricity than in 2013. In addition, the nuclear powerplant at Krsko produced 20% more electricity in 2014 than in 2013 (Statistical Office of the Republic of Slovenia, 2014; Energy Agency, 2015, p. 40, 42).

Natural Gas.—In 2014, Slovenia's natural gas consumption and the volume of imported natural gas continued to decrease. About 739 million cubic meters of natural gas was imported in 2014 compared with about 841 million cubic meters (revised) in 2013 and about 870 million cubic meters in 2012. Geoplin remained the leading domestic natural gas supplier with a market share of 65.76%; however, the volume of its imported gas decreased by 20%. In 2014, Austria was the leading supplier of natural gas to Slovenia and provided 61% of the gas purchased by suppliers; about 37% of imported natural gas came from Russia. In 2013, Russia was the leading supplier and Austria was second (Energy Agency, 2015, p. 87, 108–110).

At the end of 2014, Ascent Resources plc of the United Kingdom held a 75% interest in the Petisovci gas project, which is located in northeastern Slovenia, through its subsidiary, Ascent Slovenia Ltd. The company reported an independently verified estimate of gas in place of 13 billion cubic meters. In 2014, Ascent continued to search for partners to help fund development costs of the field. In July, the application for an Integrated Pollution Prevention and Control (IPPC) permit, which is required for a new gas plant, was submitted

to the Environmental Agency and was approved in December, subject to public consultation (Ascent Resources plc, 2015).

Outlook

Production of minerals and mineral products in Slovenia will likely continue to be modest, indicating that Slovenia will remain dependent on mineral imports to satisfy its domestic requirements. The production of flat sheet steel and bar steel at SIJ may increase in the short term. Domestic natural gas consumption may continue to decrease in the short term, but domestic production and demand will likely increase in the medium to long term as the Petisovci gas project is brought online. The significant increases in production of electricity from hydroelectric, nuclear, and renewable energy sources seen in 2014 may continue in the near term; these sources are likely to play important roles in meeting the country's energy requirements.

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TABLE 1
SLOVENIA: PRODUCTION OF MINERAL COMMODITIES¹

(Metric tons unless otherwise specified)

Commodity ²	2010	2011	2012	2013	2014
METALS					
Aluminum:					
Primary thousand metric tons	40 ^r	75 ^r	83	84 ^r	83 ^e
Secondary ^e	16,800	18,900	18,300	18,000	18,000
Iron and steel, metal:					
Crude steel from electric arc furnaces	606,000	648,000	632,000	618,000	615,000
Semimanufactures	656,943	706,133	700,826	677,095	664,200
Lead, refined, secondary	14,000	15,000	12,000 ^r	12,000	12,000 ^e
INDUSTRIAL MINERALS					
Cement thousand metric tons	799	620	953	1,139	1,326
Clays:					
Bentonite	135	168	98	143	199
Ceramic clay, crude	12,279	10,103	165,041 ^r	184,227 ^r	162,405
Salt, all sources	590	4,291	5,684 ^r	3,360 ^r	--
Sand and gravel, excluding silica sands thousand metric tons	2,443	1,900	1,707	2,143	2,799
Silica sands (quartz and quartzite)	253,866	230,908	219,481	224,387	207,381
Stone, excluding quartzite, crude:					
Aggregate thousand metric tons	14,495	11,527	9,265	9,211	9,200 ^e
Chert	16,114	18,907	9,960	11,530	15,340
Crushed, dolomite and limestone thousand metric tons	12,073	9,627	7,557	7,068	8,124
Dimension	55,000 ^e	55,000 ^e	55,906	70,506	112,671
MINERAL FUELS AND RELATED MATERIALS					
Coal:					
Subbituminous thousand metric tons	419	436	314 ^r	-- ^r	--
Lignite do.	4,011 ^r	4,066 ^r	3,967 ^r	3,721 ^r	3,108
Total do.	4,430 ^r	4,502 ^r	4,281 ^r	3,721 ^r	3,108
Natural gas thousand cubic meters	6,675	2,489	1,593	3,033 ^r	2,736
Petroleum, crude 42-gallon barrels	1,561	1,762	2,045 ^r	2,184 ^r	2,683

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

¹Table includes data available through October 15, 2015.

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

TABLE 2
SLOVENIA: STRUCTURE OF THE MINERAL INDUSTRY IN 2014

(Thousand metric tons)

Commodity	Major operating companies and major equity owners	Location of main facilities	Annual capacity
Aluminum, primary	Talum Aluminij d.o.o. [Elektro Slovenija d.o.o. (ELES), 83.44%]	Smelter at Kidricevo	85 ^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:			
Subbituminous	Rudnik-Trbovlje-Hrastnik d.o.o. (RTH) (Government, 100%)	Trbovlje Hrastnik Mine near Trbovlje	500 ^{c, 1}
Lignite	Premogovnik Velenje, d.d. (Holding Slovenske Elektrane d.o.o., 77.73%)	Mine at Velenje	4,000
Lead, metal, secondary	MPI-Reciklaza Metalurgija, plastika in inženiring d.o.o.	Refinery at Zerjav	35
Salt	SOLINE Pridelava soli d.o.o. (Mobitel d.d.)	Salt pans at Secovlje and Strunjan	2
Steel, crude	Acroni Jesenice d.o.o. (Dilon, d.o.o., 72%, and Government, 25%)	Plant at Jesenice	800
Do.	Metal Ravne d.o.o. (Dilon, d.o.o., 72%, and Government, 25%)	Plant at Ravne na Koroskem	90
Do.	Štore Steel d.o.o. (Unior d.d., 29.25%)	Plant at Store	185 ^c
Stone, natural (granite and marble)	Mineral Ltd.	Plant at Podpec	NA

^cEstimated. Do., Ditto. NA Not available.

¹Production ceased in the first quarter of 2013.