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The Mineral Industry of Belarus

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Note: In this chapter, information for 2017 is followed by information for 2018.

Belarus' major mineral production entities included a potash mining company, three steel plants, a nitrogen production enterprise, and two crude petroleum refineries. In 2017, Belarus was the third-ranked country among the world's potash producers (following Canada and Russia), accounting for 17% of world production; it was the seventh-ranked peat producer, with 5.4% of world production (Brioche, 2019; Jasinski, 2019). Peat was produced, mainly in the form of briquets, by more than 30 small plants that were located around the country. 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 and other energy facilities (petroleum pipelines and gas pipelines) that positioned the country as an important player in the transportation of petroleum and natural gas to Europe from Russia.

Minerals in the National Economy

In 2017, the country's real gross domestic product (GDP) decreased by 2.4% compared with that of 2016, and the nominal GDP amounted to $54.5 billion.[1] The industrial production of Belarus contributed 22.2% to the country's GDP; the mining sector accounted for 1.3% of industrial production. Total industrial production in constant prices increased by 6.1% compared with that of 2016. In 2017, the volume of output of the mining and quarrying industry increased by 3.3% compared with that of 2016, the combined volume of metallurgical production and products made out of metal increased by 4.1%, and the production of coke and refinery products decreased by 0.1% (National Statistical Committee of the Republic of Belarus, 2018, p. 18–26, 215–240, 266–290).

The total value of foreign direct investment (FDI) in Belarus's economy in 2017 was $7.6 billion, which was a 10.2% increase compared with the amount of FDI in 2016. The mineral sector received only 0.6% of the total FDI. Russia provided 37.3% of the total FDI, and the United Kingdom provided 32.2% of the total FDI (National Statistical Committee of the Republic of Belarus, 2018 p. 421–430).

In 2017, Belarus exported $29.3 billion worth of goods, which was a 24.3% increase compared with the goods export revenue in 2016. Belarus also imported $34.2 billion worth of goods, which was a 24.0% increase compared with the value of goods imports in 2016. In 2017, Belarus exported 12.3 million metric tons (Mt) of refined petroleum products, 6.4 Mt of potash (in K_2O equivalent), 1.8 Mt of raw steel, 288,900 metric tons (t) of nitric fertilizers, and 90,900 t of steel cord (National Statistical Committee of the Republic of Belarus, 2018, p. 463–489).

The major export partner of Belarus was Russia, which received 44.1% of all exports, by value. It was followed by Ukraine (11.5%), the United Kingdom (8.2%), Germany and the Netherlands (3.8% each), Poland (3.7%), and Lithuania (2.9%). The main import categories were, in decreasing order of value, mineral products (including petroleum and natural gas), chemicals, equipment and machinery, agricultural products and food, and metals. The major import partner of Belarus was Russia, which supplied 57.2% of imported goods, by value. Other significant import partners were China (8.0%), Germany (5.0%), Poland (3.9%), and Ukraine (3.6%) (National Statistical Committee of the Republic of Belarus, 2018, p. 463–489).

Production

In 2017, Belarus increased its peat production for fuel use by 40% to about 2.03 Mt; salt, by 24% to about 3.07 Mt; steel pipe, by 22% to 235,300 t; sulfuric acid, by 16% to 815,000 t; potash, by 15% to about 7.1 Mt in K_2O equivalent; gypsum, by 8.8% to 68,000 t; rolled steel, by 7.5% to about 2.20 Mt; and raw steel, by 7.4%, to about 2.43 Mt. Peat production for horticultural use decreased by 8.0% to 151,000 t. These and other production data are in table 1.

Structure of the Mineral Industry

Most large mineral-producing enterprises in Belarus were owned by the Government. Table 2 is a list of companies working in the mineral industry of Belarus.

Commodity Review

Metals

Iron and Steel.—The OAO Byelorussian Steel Works (BMZ) was the predominant producer of iron and steel in Belarus. In 2017, BMZ produced about 2.3 Mt of raw steel and about 2.2 Mt of rolled steel, 141,800 t of steel pipe, and 94,800 t of steel cord. Compared with that of 2016, production of raw steel, rolled steel, and steel cord increased by between 5% and 8%, and production of steel pipe increased by 70% (OAO Byelorussian Steel Works, 2018).

Industrial Minerals

Potash.—OAO Belaruskali (Belaruskali) was one of the world's leading producers of potash fertilizers, and historically, potash was the leading export product from Belarus. The company mined the Starobin potash deposit, which contains

[1]Where necessary, values have been converted from Belarusian rubles (BYN) to U.S. dollars (US$) at an annual average exchange rate of BYN1.9318=US$1.00 for 2017. In July 2016, Belarussian ruble (BYR) underwent a change in its denomination, as a result of which 10,000 old Belarussian rubles became 1 new Belarusian ruble, which is abbreviated as BYN.

magnesium salt, rock salt, and sylvinite. In 2017, Belaruskali extracted 50 Mt of potash ore and increased production by 14.2% to about 7.1 Mt of potash (in K_2O equivalent), which was the highest production in the company's history. As of 2017, Belaruskali had total capacity of 12.6 million metric tons per year (Mt/yr) of potassium chloride (about 7.7 Mt/yr in K_2O equivalent). Belaruskali exported potash to 107 countries and accounted for about 20% of the world's exports of potash (Kuletski, 2017; OAO Belaruskali, 2018; Primepress.by, 2018a).

In 2017, Belaruskali continued construction of the Petrikovskiy mining and beneficiation complex (GOK), which was the largest single investment project of Belaruskali in the company's history. The construction of the GOK created about 150 jobs. In 2017, the company continued construction of two major mining shafts 8 meters (m) in diameter and 800 m deep; as of November, the shafts were about 400 m deep. The company was also building a flotation beneficiation plant. Belaruskali was planning to finance construction of the Petrikovskiy GOK from its own funds, and the total cost of the project was estimated to be between 1.5 billion and 1.7 billion rubles (between $776 million and $880 million). According to the project plans, the first stage of the GOK would be completed in December 2019 and would reach full capacity by December 2021. The initial projected capacity of the GOK would be 7 Mt/yr of potash ore (1.5 Mt/yr of potassium chloride); by 2025, the GOK would increase its capacity to 3.0 Mt/yr of potassium chloride. The Petrikovskiy GOK was to be built on a new potash deposit located to the southeast of the Starobin deposit in Minskaya Voblasts'. The resources of the deposit were estimated to be 2.2 billion metric tons (Gt) of potash, and the life of the mine was projected to be 90 years. When completed, the new mine was expected to provide a total of 2,500 jobs (Belta.by, 2016; Ont.by, 2016; Kaliyshik Saligorska, 2017; Petrova, 2017).

In 2017, Slavkali of Russia continued construction of a GOK in the Lyubanskiy region of Minskaya Voblasts' that would use an undeveloped part of the Starobin potash deposit. Slavkali's portion of the Starobin deposit had identified resources of 3 Gt of mineralized material, and the design capacity of the GOK was 2 Mt/yr of potassium chloride. The new GOK was named Nezhinskiy, and the total cost of the project was expected to be about $2 billion. The original investment agreement between Slavkali and the Government of Belarus was signed in 2011. In addition to the investment in the potash GOK, Slavkali promised to invest at least $250 million in infrastructure projects in Belarus. The Belarusian Potash Company (BKK), which exported potash produced at Belaruskali, expressed its readiness to cooperate with Slavkali and to continue developing the market for potash in the world. The GOK was expected to be commissioned in 2021 and to provide about 2,000 jobs (Ont.by, 2015; Sputnik.by, 2016; Belta.by, 2017; Levinsky and Abakumova, 2017; PrimePress.by, 2017).

Mineral Fuels and Other Sources of Energy

Nuclear Energy.— In 2017, Belarus continued construction of a nuclear powerplant near the city of Ostrovets in Hrodzyenskaya Voblasts'. The plant would contain two blocks with a combined capacity of 2,400 megawatts. The first block was planned to be commissioned in 2019, and the second one, in 2021. Atomstroyeksport of Russia won a tender in 2011 and was expected to complete construction on a turnkey basis. The total cost of the project was estimated to be about $11 billion (Naviny.by, 2017; Atomic-energy.ru, 2018).

Refinery Products.—In 2017, Belarus had two petroleum refineries, OAO Mozyr NPZ and OAO Naftan, with combined crude petroleum throughput of 23 Mt (about 168 million barrels). In 2017, the refineries processed 145 million barrels of crude petroleum, which was a 2.6% decrease compared with the amount processed in 2016. Belarus imported most of the crude petroleum for its refineries from Russia and, until 2014, was able to buy petroleum without export tariffs or other taxes. In 2014, Russia began a reform of petroleum prices by reducing export tariffs and simultaneously increasing the tax on the extraction of natural resources (NDPI) (a type of royalty). The goal was eventually to eliminate the export tariff and to collect taxes through the NDPI. This tax reform was named the petroleum tax maneuver. As a result of the tax maneuver, the prices paid by Belarusian refineries for petroleum imports from Russia became higher than they were prior to 2014. Belarusian refineries were not charged export tariffs, which were being lowered, but were charged the NDPI, which was gradually increasing. As of 2017, Belarus paid about 80% of the world price for crude petroleum from Russia and expected that the prices would continue to increase in the future (tables 1, 2; Manenok, 2017; Interfax.by, 2018; Primepress.by, 2018b).

MINERAL INDUSTRY HIGHLIGHTS IN 2018

In 2018, Belarus continued to be a mineral producer of regional importance only, except for its potash and peat production, which were of global importance. The country was ranked second among the world's potash producers, following Canada, with 16.6% of world production; it was the world's fourth-ranked peat producer, accounting for 8.6% of world production (Brioche, 2020; Jasinski, 2020).

In 2018, Belarus increased its peat production for horticultural use by 79% to about 270,000 t; peat for fuel use, by 16% to about 2.35 Mt; dolomite and salt, by 9% each to about 2.23 Mt and 3.35 Mt, respectively; steel pipe, by 6.8% to 251,300 t; rolled steel, by 6.2% to 2.34 Mt; raw steel, by 6.0% to 2.58 Mt; and lime, by 5.3% to 476,000 t. Gypsum production decreased by 5.9% to 64,000 t. These and other production data are in table 1.

As of August 2018, the construction of the Petrikovskiy GOK was about 70% complete. In 2018, Belaruskali continued to build mine shafts and the beneficiation plant. In 2018, the company was on track to open its first stage of the project in December 2019 and to reach the design capacity by 2021 as planned (Belta.by, 2018).

Slavkali intended to invest 350 million euros (about $413 million) in 2018 and then 600 million euros (about $708 million) in 2019 in construction of the Nezhinskiy GOK.[2] The construction would include a mine, a beneficiation complex, and a powerplant powered by natural gas as well as a

[2]Where necessary, values have been converted from euro area euros (EUR) to U.S. dollars (US$) at an annual average exchange rate of EUR0.848=US$1.00 for 2018.

railroad, automobile road, and other infrastructure elements. The construction was expected to be completed in 2020, and the total capacity would be 2 Mt/yr of potassium chloride, as originally planned (RCC.ru, 2018).

In July, Belaruskali announced a plan to construct a new mine at the Starobin potash deposit. The new project, which was named the Darasinsky Mine, would be completed in 9 years and would have a production capacity of 8 Mt/yr of mined ore and about 1.8 Mt/yr of potassium fertilizers. The Darsinsky sector of the Starobin deposit, was located in the northwestern portion of the deposit, in close proximity to currently producing sectors. The new mine was expected to replace the production capacity of currently producing mines that would be depleted in the future. Also, about 1,500 trained workers who were currently employed at other Belaruskali mines would be able to be reemployed at the new mine. Conditional on the approval of the project, which would include a series of public hearings, construction of the mine was expected to begin in December (Tut.by, 2018).

Outlook

Belarus is expected to continue to be a major supplier of potash to world markets. Potash production is expected to increase, especially after the Petrikovskiy and the Nezhinskiy GOKs come online. The future of Belarus's economy in general and the mineral sector particularly are likely to depend on political relations with Russia and on the country's ability to develop and maintain a reliable trade network around the world.

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TABLE 1
BELARUS: PRODUCTION OF MINERAL COMMODITIES[1]

(Thousand metric tons, gross weight, unless otherwise specified)

Commodity		2014	2015	2016	2017	2018
METALS						
Iron and steel:						
Raw steel		2,598	2,577	2,266	2,433	2,580
Products:						
Cord	metric tons	80,700	88,000	90,200	94,800	91,800
Pipe	do.	224,800	212,200	192,300 r	235,300	251,300
Rolled		2,376	2,392	2,051 r	2,204	2,340
INDUSTRIAL MINERALS						
Cement, hydraulic		5,617	4,638	4,503	4,490	4,519
Diamond, synthetic, industrial	carats	25,000,000 e	--	--	--	--
Gypsum, mine		64	43	63	68	64
Lime		769	626	474	452	476
Nitrogen, ammonia, N content	metric tons	1,019,200	1,060,400	1,039,700	1,049,500	1,050,500
Potash, K_2O content		6,340	6,468	6,180	7,102	7,346
Salt	metric tons	1,820,500	2,055,000 r	2,476,500	3,068,500	3,347,300
Stone, crushed, dolomite		3,149	2,657	2,083 r	2,052	2,236
Sulfur, compounds, sulfuric acid		699	699	700	815	852
MINERAL FUELS AND RELATED MATERIALS						
Natural gas	million cubic meters	222	225	215	205	211
Peat:						
Fuel use		1,433	1,000 r	1,457 r	2,034	2,354
Horticultural use		216 r	237 r	164 r	151	270
Petroleum:						
Crude	thousand 42-gallon barrels	12,100	12,100	12,100	12,100	12,200
Refinery	do.	178,300	184,000	148,800	145,000	145,600

eEstimated. rRevised. do. Ditto. -- Zero.

[1]Table includes data available through September 16, 2019. All data are reported unless otherwise noted. Estimated data are rounded to no more than three significant digits.

TABLE 2
BELARUS: STRUCTURE OF THE MINERAL INDUSTRY IN 2018

(Metric tons unless otherwise specified)

Commodity	Major operating companies and major equity owners	Location of main facilities	Annual capacity[e]
Cement	OAO Belarusian Cement Plant (BCZ)	Mahylyowskaya Voblasts'	2,900,000
Do.	OAO Krasnoselskstroymaterialy	Hrodzyenskaya Voblasts'	2,700,000
Do.	OAO Krichevtsementnoshifer	Mahylyowskaya Voblasts'	1,800,000
Diamond, synthetic	Gomel Production Association Kristall	Homyel'skaya Voblasts'	NA [1]
Nitrogen	OAO Grodno Azot [Belneftekhim (Government)]	Hrodzyenskaya Voblasts'	1,100,000 [2]
Peat, fuel use	Production at 31 enterprises that produce mainly briquets	All regions of the country	5,000,000 [3]
Petroleum:			
Crude thousand 42-gallon barrels	NGDU Rechitsaneft [Belneftekhim (Government)]	Rechitskoye, Ostashkovichskoye, Vishanskoye, Tishkovskoye, and Yuzhno-Ostashkovichskoye deposits, southeastern part of the country	13,000
Refined do.	OAO Mozyr NPZ (Government, 42.76%; MNPZ Plyus, 12.25%; Slavneft, 42.58%)	Homyel'skaya Voblasts'	77,000 [4]
Do. do.	OAO Naftan (Novopolotsk NPZ)	Vitsyebskaya Voblasts'	91,000 [4]
Potash, K_2O equivalent	OAO Belaruskali (Government)	Starobin deposit, Minskaya Voblasts'	7,700,000
Steel:			
Raw	OAO Byelorussian Steel Works (BMZ) [Belarusian Metallurgical Co. Holding (Government, 100%)]	Zhlobin, Homyel'skaya Voblasts'	2,700,000
Products:			
Cord	do.	do.	100,000
Pipe	do.	do.	240,000
Do.	OAO Mogilev Metallurgical Works [OAO Byelorussian Steel Works (BMZ)]	Mahylyowskaya Voblasts'	NA
Do.	OJSC Rechitsa Metizny Plant [Belarusian Metallurgical Co. Holding (Government, 100%)]	Homyel'skaya Voblasts'	NA
Rolled	OAO Byelorussian Steel Works (BMZ) [Belarusian Metallurgical Co. Holding (Government, 100%)]	Zhlobin, Homyel'skaya Voblasts'	2,300,000
Do.	OAO Mogilev Metallurgical Works [OAO Byelorussian Steel Works (BMZ)]	Mahylyowskaya Voblasts'	120,000
Do.	OJSC Rechitsa Metizny Plant [Belarusian Metallurgical Co. Holding (Government, 100%)]	Homyel'skaya Voblasts'	NA

[e]Estimated; estimated data are rounded to no more than three significant digits. Do., do. Ditto. NA Not available.
[1]Production stopped in 2015.
[2]N content of ammonia.
[3]Total peat for fuel use.
[4]Crude throughput.