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The Mineral Industry of Belarus

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Belarus's major mineral production companies included a potash mining company, three steel plants, a nitrogen production enterprise, and two crude petroleum refineries. In 2019, Belarus was the second-ranked country, following Canada, among the world's potash producers, accounting for 17.8% of world production, and it was the fourth-ranked peat producer, accounting for 8.4% of world production. 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 energy infrastructure (petroleum pipelines and gas pipelines) and other energy facilities that positioned the country as a notable player in the transportation of petroleum and natural gas to Europe from Russia (table 2; Brioche, 2021; Jasinski, 2021).

In 2019, the Ministry of Natural Resources and Environment organized exploration for various minerals in Belarus. As a result of this exploration work, the Ministry announced an increase in the country's resources of several minerals. The resources of basalt were estimated to be about 10 million metric tons (Mt). Petroleum resources were increased by 1.7 Mt and the resources of quartz sand were increased by 5.2 Mt. Additionally, new resources of construction stone and peat were added. In 2018, the Ministry had estimated the resources of 37 new deposits that were ready for development; in particular, petroleum resources had been increased by 638,000 metric tons (t). During 2021–25, the Ministry planned to develop a strategy for geologic exploration and to produce detailed geologic maps for the entire territory of the country (Belta.by, 2019d, h; 2020c).

Minerals in the National Economy

In 2019, the country's real gross domestic product (GDP) increased by 1.2% compared with that for the year 2018, and the nominal GDP was $63.2 billion.[1] The industrial production of Belarus contributed 38.0% to the country's GDP; the mining sector accounted for 0.7% of industrial production. Total industrial production in constant prices increased by 1.0% compared with that in 2018. In 2019, in terms of tonnage, mining and quarrying output increased by 0.4% compared with that in 2018; the combined output of metallurgical production and products made of metal increased by 9.8%, and the output of coke and refinery products decreased by 5.2% (National Statistical Committee of the Republic of Belarus, 2020, p. 16–17, 187, 236–239).

The total value of foreign direct investment (FDI) in Belarus's economy in 2019 was $7.2 billion, which was a 15.2% decrease compared with the FDI in 2018. The mineral sector received only 0.7% of the total FDI. Russia provided 39.6% of the total FDI, and the United Kingdom provided 23.6% (National Statistical Committee of the Republic of Belarus, 2020, p. 379–381).

In 2019, Belarus exported $33.0 billion worth of goods, which was a 2.8% decrease compared with that in 2018. Belarus also imported $39.5 billion worth of goods, which was a 2.7% increase compared with that in 2018. In 2019, Belarus exported 10.5 Mt of refined petroleum products; 6.2 Mt of potash (in K_2O equivalent); 2.1 Mt of raw steel; 337,100 t of nitric fertilizers (in N equivalent); and 82,800 t of steel cord. The major export partner of Belarus was Russia, which received 41.5% of all exports, by value. It was followed by Ukraine (12.6%), the United Kingdom (7.0%), Germany (4.0%), Poland (3.9%), and Lithuania (3.2%) (National Statistical Committee of the Republic of Belarus, 2020, p. 360, 366, 368–369).

The country's main import categories were (in order of decreasing 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 55.8% of Belarus's imported goods, by value. Other significant import partners were China (9.6%), Germany (4.5%), Ukraine (4.3%), and Poland (3.4%) (National Statistical Committee of the Republic of Belarus, 2020, p. 360, 366, 370).

Production

In 2019, Belarus increased its peat production for horticultural use by 7.8% to 291,000 t; rolled steel, by 7.0% to about 2.5 Mt; gypsum, by 6.3% to 68,000 t; and raw steel, by 5.6% to about 2.72 Mt. Output of nitrogen (N content of ammonia) decreased by 18% to 857,000 t; salt, by 12% to about 2.95 Mt; and steel pipe, by 9.6% to 227,200 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 the mineral industry facilities.

Commodity Review

Metals

Iron and Steel.—OAO Byelorussian Steel Works (BMZ) was the predominant producer of iron and steel in Belarus. In 2019, BMZ produced about 2.6 Mt of raw steel; about 2.3 Mt of rolled steel; 120,990 t of steel pipe; and 89,200 t of steel cord. In 2019, BMZ exported 2.2 Mt of metal products valued at $1.16 billion to about 65 countries. The leading recipients of BMZ exports were countries in Africa, countries of the European Union (EU), and Russia. On average, in recent years, about 80% of

[1]Where necessary, values have been converted from Belarusian rubles (BYN) to U.S. dollars (US$) at the annual average exchange rates of BYN2.0870=US$1.00 for 2019 and BYN2.0346=US$1.00 for 2018. In July 2016, the Belarusian ruble (BYR) underwent redenomination, as a result of which 10,000 old Belarusian rubles became 1 new Belarusian ruble, which is abbreviated as BYN.

BMZ's metal production was exported (Belta.by, 2020a; OAO Byelorussian Steel Works, 2020).

Industrial Minerals

Cement.—In 2019, cement production in Belarus increased by 4.6% compared with that in 2018 to about 4.7 Mt. Of this amount, 1.5 Mt was exported, which was a 9.7% decrease compared with exports in 2018, and the rest was sold domestically. The leading recipients of cement from Belarus were Latvia, Lithuania, Poland, and Russia. Belarus had three cement plants—OAO Belarusian Cement Plant, OAO Krasnoselskstroymaterialy, and OAO Krichevtsementnoshifer—all of which were owned by the Government (tables 1, 2; Yaroshevich, 2020).

In 2008–13, cement plants in Belarus underwent modernization that increased the production capacity of each plant by about 1.5 million metric tons per year (Mt/yr) of cement, and the combined capacity increased to 7.4 Mt/yr of cement. The cost of modernization amounted to about $1.2 billion. Production remained well below capacity, however, reaching a level of only between 60% and 70% of capacity in recent years. As of 2019, the loans for modernization had not yet been paid off and the remaining total debt, including principal, interest, and fees, amounted to about $900 million. Moreover, the cement plants continued to register financial losses. For example, in 2019, total losses amounted to 53 million rubles (about $25.3 million). In May 2019, the Government restructured the modernization loans by extending the loan terms by between 10 and 20 years, froze the payments on the debt for already used fuels, and waived the real estate taxes for all three cement plants for 2019. Also, the Government required imported portland cement to be licensed for quality, which restricted competition from imported cement in the domestic market (Sychevich, 2019; Afn.by, 2020; Yaroshevich, 2020).

In May 2019, Ukraine enacted antidumping tariffs on cement exported from Belarus, Moldova, and Russia. The tariff rate for Belarus was set at 57.03%; Moldova, 94.46%; and Russia, 114.95%. All tariffs were to remain in effect for 5 years. Belarusian cement plants considered the tariff effectively prohibitive. Prior to the tariff, shipments to Ukraine accounted for about 20% of Belarus's cement exports (Borisov, 2019).

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 magnesium salt, rock salt, and sylvinite. In 2019, Belaruskali's potash (in K_2O equivalent) production remained unchanged at about 7.3 Mt, and potassium chloride production amounted to about 12.3 Mt. The company planned to increase its production capacity to 15.5 Mt/yr of potassium chloride by 2025 (tables 1, 2; Kuletski, 2017; PrimePress.by, 2018a; Manenok, 2019; Interfax.by, 2020; OAO Belaruskali, 2020).

In November 2019, Belaruskali began production of sylvinite at the Petrikovskiy mining and beneficiation complex (GOK)—a $1.5 billion complex that was the single largest investment project in the company's history. Belaruskali planned to produce 300,000 t of potassium fertilizers in 2020 and 800,000 t in 2021. The initial capacity of the GOK was projected to be 7 Mt/yr of potash ore (1.5 Mt/yr of potassium chloride), which was expected to be reached in 2023; later, the GOK planned to 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. As of yearend, the Petrikovskiy GOK had 230 employees. At full capacity, the new mine was expected to provide a total of 1,600 jobs (Loyko, 2014; Kaliyshik Saligorska, 2017; Petrova, 2017; Belta.by, 2019f, 2020b; Manenok, 2019).

In 2019, Slavkali of Russia continued construction of a new GOK (named the Nezhinskiy 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 total cost of the Nezhinskiy project was expected to be about $2 billion. The original investment agreement between Slavkali and the Government of Belarus was signed in 2011. Slavkali invested $400 million in construction of the Nezhinskiy GOK in 2019 and planned to invest another $400 million in 2020. The Nezhinskiy GOK was expected to be commissioned in 2023 and to provide about 2,000 jobs (Levinsky and Abakumova, 2017; PrimePress.by, 2017; Belta.by, 2019c, e, g).

In May 2019, Belaruskali began construction of a new mine at the Starobin potash deposit. The Darasinsky sector of the Starobin deposit was located in the northwestern portion of the deposit in close proximity to currently producing sectors. The new project, which was named the Darasinsky Mine, would have the capacity to produce 8 Mt/yr of mined ore and about 1.8 Mt/yr of potassium fertilizers. Construction was anticipated to take about 8 years and, when completed, the mine was expected to have production life of at least 40 years. Extraction of potash salts at the Darasinsky Mine would be conducted at a depth of between 500 and 1,000 meters. The new mine was expected to replace the production capacity at 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 re-employed at the new mine (Tut.by, 2018; Belta.by, 2019a; Interfax.by, 2019; PrimePress.by, 2019).

In November 2019, the first stage of a new potassium nitrate plant in Soligorsk was commissioned. The operator (OOO Belkali-Migao) was a joint venture of OAO Belaruskali and Migao Corp. Ltd. of China. The plant was constructed in just 1 year. The benefits of potassium nitrate compared with the standard output of Belaruskali (potassium chloride) is that it contains two nutrients needed for plants and lacks chloride that could be harmful to some sensitive plant cultures, such as flowers and fruits. The new plant had the capacity to produce 80,000 metric tons per year (t/yr) of potassium nitrate and 62,000 t/yr of granulated potassium-nitrous fertilizers. Nitrous fertilizers to be used in production were expected to be imported from Russia. The products would be exported to China, EU countries, Russia, and Turkey (Belta.by, 2019b; Protaskin, 2019).

Mineral Fuels and Related Materials

Peat.—In 2019, Belarus produced about 2.6 Mt of peat, which was a 2.4% decrease compared with production in 2018. About 2.3 Mt was used as a source of energy and the rest was for horticultural use. Energy peat products produced in Belarus included peat briquets, powder peat, and sod peat, and products for use in agriculture included high-moor peat, peat soil, and peat for composting. In 2019, the country produced 961,600 t of peat briquets. During the past several years, Belarus used about 1 Mt/yr of energy peat domestically, which allowed a reduction in the consumption of imported natural gas by about 450 million cubic meters. In 2019, Belarus exported 106,000 t of peat in briquets and in powder and received $5.7 million in revenue (table 1; MinskNews.by, 2019; Sputnik.by, 2019; Bahna.land, 2020).

GPO Beltopgaz, which was a part of the Ministry of Energy, was a Government organization overseeing both state and privately owned companies and organizations involved in energy production, including peat producers. As of 2019, the peat industry included about 24 companies involved in the production and processing of peat; these companies employed about 4,000 workers. Peat production season in Belarus is usually May through September. While still in the field, peat is dried outdoors to reduce the water content to 40% from 70%, and then the peat is collected and transported to briquet plants for further processing (Sputnik.by, 2019; Bahna.land, 2020).

The resources of peat in Belarus amounted to 4 Gt located in an area of 2.4 million hectares (about 5.9 million acres). In 2017–19, production was conducted at 46 peat deposits with total resources of 93.3 Mt and an area of 38,200 hectares (about 94,400 acres). A large number of peat deposits in the country (about 66%) were relatively small (containing less than 100,000 t of peat resources per deposit) and only a small number of deposits (1.7%) had resources of at least 10 Mt. Those large deposits were concentrated in Minskaya Voblasts′ and Vitsyebskaya Voblasts′. According to industry experts, to make a briquet plant profitable, the deposit would need to have resources of at least about 8 Mt. Among the deposits under consideration for future development, only five peat deposits had resources of at least 8 Mt (Bahna.land, 2020).

Refined Petroleum.—In 2019, Belarus had two petroleum refineries—OAO Mozyr NPZ and OAO Naftan—which had a combined crude petroleum throughput of 23 Mt/yr (about 168 million barrels per year). In 2019, the refineries processed 142.8 million barrels (Mbbl) of crude petroleum, which was a 1.9% decrease compared with that in 2018. 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 tariffs and to concentrate all tax collection in the NDPI. This tax reform was named the petroleum tax maneuver. As a result of the tax maneuver, prices of petroleum imports from Russia for Belarusian refineries became higher than they were prior to 2014. The NDPI charge to Belarusian refineries had been gradually increasing since 2015. According to the Finance Ministry, losses to Belarus's budget from the tax maneuver in 2019 amounted to 520 million rubles (about $249 million). In 2019, Belarus imported 18 Mt of crude petroleum (about 132 Mbbl) from Russia and received from Russia a compensation for high petroleum prices in the amount of about $400 million. The existing agreements with Russia were set to expire by the end of 2019, and it remained to be seen if a new agreement would include a similar provision for compensation (tables 1, 2; Manenok, 2017; Interfax.by, 2018; PrimePress.by, 2018b; Zayats, 2019).

In 2019, Naftan was building a complex for delayed coking, and Mozyr NPZ was constructing a complex for hydrocracking of heavy petroleum residues (H-Oil). Naftan indicated that the complex for delayed coking, including an installation for production of elemental sulfur, would increase the effectiveness of petroleum refining to about 90% and increase the share of light petroleum products to 65%. Mozyr NPZ's H-Oil project would also increase the effectiveness of petroleum refining to about 90%, produce additional amounts of motor fuels, and reduce the sulfur content in its products to below 1%. Overall, between 2006 and 2018, Mozyr NPZ spent $1.7 billion on 17 investment projects (Sabilo, 2019).

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 Nezhinskiy GOKs come online. The future of Belarus's economy in general, and the mineral sector in particular, are likely to depend on political relations with Russia and on the country's ability to develop and maintain a reliable global trade network.

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TABLE 1
BELARUS: PRODUCTION OF MINERAL COMMODITIES[1]

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

Commodity[2]		2015	2016	2017	2018	2019
METALS						
Iron and steel, steel:						
Raw steel		2,577	2,266	2,433	2,573 r	2,718
Products:						
Cord	metric tons	88,000	90,200	94,800	91,800	89,200
Pipe	do.	212,200	192,300	235,300	251,300	227,200
Rolled		2,392	2,051	2,204	2,340	2,503
INDUSTRIAL MINERALS						
Cement, hydraulic		4,638	4,503	4,490	4,519	4,728
Gypsum, mine		43	63	68	64	68
Lime		626	474	452	476	464
Nitrogen, ammonia, N content	metric tons	1,060,400	1,039,700	1,049,500	1,050,500	857,000
Potash, K_2O content		6,468	6,180	7,102	7,346	7,348
Salt	metric tons	2,055,000	2,476,500	3,068,500	3,347,300	2,948,500
Stone, crushed, dolomite		2,657	2,083	2,052	2,236	2,305
Sulfur, compounds, sulfuric acid		698 r	700	815	852	844
MINERAL FUELS AND RELATED MATERIALS						
Natural gas	million cubic meters	225	215	205	211	218
Peat:						
Fuel use		1,000	1,457	2,034	2,354	2,269
Horticultural use		237	164	151	270	291
Petroleum:						
Crude	42-gallon barrels	12,100	12,100	12,100	12,200	12,300
Refinery	do.	184,000	148,800	145,000	145,600	142,800

[r]Revised. do. Ditto.

[1]Table includes data available through September 21, 2020. All data are reported unless otherwise noted.

[2]In addition to the commodities listed, synthetic diamond may have been produced, but available information was inadequate to make reliable estimates of output.

TABLE 2
BELARUS: STRUCTURE OF THE MINERAL INDUSTRY IN 2019

(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) (Government, 100%)	Plant in Mahilyowskaya Voblasts'	2,900,000
Do.		OAO Krasnoselskstroymaterialy (Government, 100%)	Plant in Hrodzyenskaya Voblasts'	2,700,000
Do.		OAO Krichevtsementnoshifer (Government, 100%)	Plant in Mahilyowskaya Voblasts'	1,800,000
Diamond, synthetic		Gomel Production Association Kristall	Plant in Homyel'skaya Voblasts'	NA [1]
Nitrogen		OAO Grodno Azot [Belneftekhim (Government, 100%)]	Plant in Hrodzyenskaya Voblasts'	1,100,000 [2]
Peat		About 24 enterprises engaged in production and processing of peat	Mines and plants in all regions of the country	5,000,000 [3]
Petroleum:				
Crude	thousand 42-gallon barrels	NGDU Rechitsaneft' [Belneftekhim (Government, 100%)]	Rechitskoye, Ostashkovichskoye, Vishanskoye, Tishkovskoye, and Yuzhno-Ostashkovichskoye deposits, southeastern part of the country	13,000
Refined	do.	OAO Mozyr NPZ (Government, 42.76%; Slavneft, 42.58%; MNPZ Plyus, 12.25%; private owners, 2.41%)	Refinery in Homyel'skaya Voblasts'	77,000 [4]
Do.	do.	OAO Naftan (Novopolotsk NPZ)	Refinery in Vitsyebskaya Voblasts'	91,000 [4]
Potash, K_2O equivalent		OAO Belaruskali (Government, 100%)	Mines and plants in Starobin deposit, Minskaya Voblasts'	7,700,000
Steel:				
Raw		OAO Byelorussian Steel Works (BMZ) [Belarusian Metallurgical Co. Holding (Government, 100%)]	Plant in 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)]	Plant in Mahilyowskaya Voblasts'	NA
Do.		OJSC Rechitsa Metizny Plant [Belarusian Metallurgical Co. Holding (Government, 100%)]	Plant in Homyel'skaya Voblasts'	NA
Rolled		OAO Byelorussian Steel Works (BMZ) [Belarusian Metallurgical Co. Holding (Government, 100%)]	Plant in Zhlobin, Homyel'skaya Voblasts'	2,300,000
Do.		OAO Mogilev Metallurgical Works [OAO Byelorussian Steel Works (BMZ)]	Plant in Mahilyowskaya Voblasts'	120,000
Do.		OJSC Rechitsa Metizny Plant [Belarusian Metallurgical Co. Holding (Government, 100%)]	Plant in Rechitsa, 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.