

SLOVENIA

*By Walter G Steblez
US Geological Survey*

Slovenia's mineral extractive industries produce modest quantities of coal, natural gas, petroleum, and a variety of industrial minerals. Slovakia relies largely on imports to meet most of its minerals needs. The latest aggregated data for 2003, report imports of crude materials other than fuels to have exceeded imports in the same category more than threefold; imports of mineral fuels exceeded exports more than sixfold.

Slovenia's economy continued to grow, and gross domestic product (GDP) in 2003 amounted to US\$39.1 billion (purchasing power parity), an increase of about 3.7% compared with 2002. The mining and quarrying sector's share of GDP, amounted to about 0.9%. The total volume of industrial production increased by about 1.4%, of which the volume of output of the mining and quarrying sector rose by about 5.5%. Output of non-mineral fuels-related mineral commodities increased by about 10.3%, and output of mineral fuels and refinery products rose by 3.6%.

The main components of Slovenia's metallurgical industries include primary aluminum production at Kidričevo (Talum d o o) and three steel mills – Slovenske Zelezarne (SZ), a state-owned holding company that maintained ownership of Acroni Jesenice (Acroni) and Metal Ravne; and Inexa Steel Ltd (formerly Jekla Štore) and a subsidiary of the Inexa Group of Sweden since 1999. In 2003, Slovenia's total output of crude steel rose by about 13% and steel production reached almost full capacity, in contrast to the preceding five years when production was strongly affected by the dissolution of the former Yugoslav market and weak global and regional demand for steel.

The reversion of Inexa to Slovenian ownership was one of the noteworthy events in the steel sector in 2003. In mid-year, Unior, Slovenia's major tool-making enterprise, acquired a majority stock holding in Inexa Štore (60%) from Inexa AB of Sweden, which became a majority stock owner in Štore in 1999. Štore, an important regional producer of spring steels, had already been a supplier of about 20% of its annual production to Unior.

Acroni reported positive year-end results, which included production increases of 12.3%, 23.7% and 20.6% for finished products, heavy plate and hot-rolled strips, respectively. In addition, the company undertook 33 investment projects, of which the new annealing line for finished electrical steel sheets and a new vacuum oxidising degassing unit should play major roles in raising output and product quality.

Aluminium production increased by about 25% in 2003. Talum produced almost 110,000 t, which approached the plant's new capacity of 117,000 t/y (75,000 t in 2002). Efforts to privatise Talum, which produces semi-manufactures in addition to smelting aluminium, gained initial momentum as

regional and some major European aluminium producers vied to gain a controlling interest in the enterprise. The inability of bidders to resolve differences with the government about electricity supply rates, however, forced the latter to suspend Talum's sale at the end of the year. An agreement between Talum and Hydro Norsk ASA of Norway was reached which stipulates that Norsk purchases 70,000 t/y of Talum's aluminium casthouse alloys until 2011. These purchases would be in addition to Norsk's purchases from Talum of 50,000 t/y of aluminum extrusion ingots.

The industrial minerals sector depended mainly on imported raw material. The latest available trade data for 2002 show net imports of bentonite, diamond (all grades), feldspar, fluorspar, gypsum magnesite and salt. Among mineral fuels, total coal production increased by about 3% compared with 2002. Natural gas and petroleum production, however, declined by about 18% and 37%, respectively.

Table following page.

Slovenia: Production Of Mineral Commodities ^{1/2/} (Mt unless specified)

Commodity	2001	2002	2003	
Metals				
Aluminium, primary and secondary:	76,632	87,600	109,800 ³	
Iron and steel, metal:				
Ferroalloys:				
Ferrochromium	--	--	--	
Ferrosilicocalcium	100	100	--	
Ferrosilicon	9,000	9,000	9,000	
Crude steel from electric furnaces	462,000	481,000	543,000 ³	
Semimanufactures	450,000	400,000	594,000	
Lead:				
Lead, refined, secondary	15,400	15,400	15,000	
Industrial Minerals				
Cement	'000 t	1,300	1,250	1,300
Clays:				
Lime	'000 t	150	150	150
Pumice and related materials, volcanic tuff e/		40,000	40,000	40,000
Quartz, quartzite, glass sand:		200,000	200,000	200,000
Salt, all sources		107,755	128,212	125,000
Sand and gravel, excluding glass sand	'000 t	11,510	10,897 r	11,000
Stone, excluding quartz and quartzite, crude: e/				
Dimension		45,000	6,858 r	12,603 ³
Other	m ³	3,000	3,000	3,000
Mineral Fuels and Related Materials				
Coal:				
Brown coal	'000 t	685	639 r	608 ³
Lignite	do.	3,448	4,048	4,222 ³
Natural gas	'000 m ³	6,100	6,000	4,900 ³
Petroleum, crude		700	763 r	482 ³

e/ Estimated. r/ Revised.

^{1/}Table includes data available through June 2003.

^{2/}In addition to commodities listed, common clay, coke, and petroleum products also were produced, but available information is inadequate to make reliable estimates of output levels.

^{3/}Reported Figure.