



2013 Minerals Yearbook

UNITED KINGDOM

THE MINERAL INDUSTRY OF THE UNITED KINGDOM

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In 2013, the United Kingdom's gross domestic product (GDP) was \$2.49 trillion at official exchange rates, which was an increase in real terms of 1.8% compared with that of the previous year. Within the European Union (EU), the United Kingdom's economy was ranked second after Germany's in terms of GDP based on purchasing power parity. The country's heavy industry was composed of companies that produced automotive and aviation products, chemicals, and machine tools. These industries relied on many imported metal ores, concentrates, and refined metals, as well as on imported industrial minerals and mineral fuels. The mineral fuels sector, which included coal, natural gas, and petroleum, was significant in the United Kingdom's mineral industry (U.S. Central Intelligence Agency, 2015).

In 2012 (the latest year for which data were available), the country accounted for about 1.9% of the world's refined nickel production (including nickel content of chemicals). In 2013, the United Kingdom produced 2.6% of the world's crude salt output, 2.2% of world kaolin output, and about 1.4% of world potash output (Bolen, 2015; Jasinski, 2015; Kuck, 2015, p. 51.24; Virta, 2015).

Minerals in the National Economy

The United Kingdom's mining and processing companies played an important role in global mineral prospecting, mineral development and production, and mineral commodity trade. Actual production of metal ores in the United Kingdom has mostly ceased; the processing of metals, however, is still important for the United Kingdom's exports and its industrial sector. London is home to the London Metal Exchange, which remained the world's leading central market for nonferrous metals, and it is also an international hub for the headquarters of major mining and mineral processing companies, although many of these companies do not have production facilities in the country. The United Kingdom is a producer of various industrial minerals, and it is also a significant producer of crude oil, gas, and refinery products.

Government Policies and Programs

The 1971 Minerals Act, as amended, is the statute that governs the development and exploitation of mineral deposits. Minerals, as defined in Section 209 of the Act, include all minerals and materials in or under the land of a kind ordinarily worked for removal by underground or surface workings; they do not, however, include peat cut for purposes other than for sale. Mineral development is specifically addressed in the Town and Country Planning (Minerals) Regulations, 1971, and the Town and Country Planning (Minerals) Act, 1981. Mineral rights to mineral fuels, such as coal, petroleum, and uranium, belong to the state. The Coal Authority is authorized to license

open pit and underground mines to the private sector subject to restrictions on their size and the payment of a royalty on the amount of coal produced (British Geological Survey, 2010).

Most other mineral rights in England, Scotland, and Wales are privately owned; the Crown holds the rights to gold and silver. A different situation regarding mineral rights applies to Northern Ireland where, under the Mineral Development Act (Northern Ireland), 1969, the rights to work minerals and to license others to do so are vested in the state (British Geological Survey, 2010).

The Government of the United Kingdom had ratified the Kyoto Protocol. The EU, however, decided to meet Kyoto requirements as a whole, rather than as individual signatories, with each member state given a different emissions target by the EU (British Geological Survey, 2010).

Production

In 2013, the mineral industry had decreases exceeding 10% of the volume of production of the previous year in primary aluminum metal, coal, primary lead metal, and crude petroleum. Mineral commodities with increases in production of more than 10% compared with that of the previous year were pig iron, crude steel, and fluorspar (table 1).

Structure of the Mineral Industry

The United Kingdom is home to several leading mineral and mineral processing companies and London is the main market for trade in metals and metal-commodities-backed financial instruments, such as delivery contracts, futures, and swaps. Among the leading domestic companies, BP p.l.c. and Royal Dutch Shell plc were among the most significant in terms of value, as they ranked second and fifth, respectively, among global energy companies (Platts McGraw Hill Financial, 2015). Glencore plc is a major trading and mining Anglo-Swiss conglomerate with operations throughout the world. In the United Kingdom it produces primary and secondary lead through subsidiaries. UK Coal Production Ltd. is the principal owner and operator of underground coal mines in the United Kingdom.

Table 2 is a list of major mineral industry facilities.

Mineral Trade

In 2013, the major trade partners of the United Kingdom were mostly members of the EU, such as Belgium, France, Germany, Ireland, and the Netherlands. The most important trade partners of the United Kingdom outside the EU were China and the United States. China was the most important in terms of value of trade. In 2013, the United Kingdom had exports valued at an estimated \$813.2 billion and imports valued

at an estimated \$782.5 billion. The estimated trade balance of the United Kingdom with countries that were not members of the EU was valued at a deficit of \$1.4 billion. Imports by the United Kingdom included foodstuffs, fuels, machinery, and manufactured goods. The United Kingdom's exports were principally beverages, chemicals, fuels, manufactured goods, and tobacco products (European Commission, 2014, p. 44, 45; U.S. Central Intelligence Agency, 2015).

Commodity Review

Metals

Aluminum.—Rio Tinto Alcan Ltd.'s Lochaber smelter produced an estimated 44,000 metric tons (t) of aluminum in 2013. The company had shut down its Lynemouth smelter permanently in March 2012, citing the high cost of power and new regulations imposed on the site as the main reasons for the shutdown (table 1; Rio Tinto plc, 2012a; 2012b, p. 1).

Gold.—According to the British Geological Survey, only small quantities of gold were produced in Northern Ireland, with an estimated 42 kilograms produced in 2013. No other active mines were reported as producing gold. The Crown State is the commercial agent for the British Government in charge of providing licenses for the development and production of gold and silver in the United Kingdom (British Geological Survey, 2015, p. 45).

Industrial Minerals

The United Kingdom remained a significant producer of such minerals as barite and calcareous material for cement, clays, and fluorspar (table 1).

Barite.—The United Kingdom's barite production was dominated by M-I Drilling Fluids (UK) Ltd., which operated the underground Foss Mine located near Aberfeldy in Perthshire County, Scotland. The production of this mine accounted for most of the production in the United Kingdom; the remaining output of barite was from the Southern Pennine Orefield where barite was derived as a byproduct of fluorspar mining (table 2; British Geological Survey, 2011, p. 25; 2012, p. 25; 2015, p. 26).

Mineral Fuels

Coal.—The production of coal amounted to 2.5% of the total value of the minerals produced in the United Kingdom, and the coal industry employed a total of 3,571 people in 2013. Most coal was mined in England (British Geological Survey, 2015, p. 10, 12, 14).

Natural Gas and Petroleum.—The production of crude petroleum amounted to 67% of the total value of the minerals produced in the United Kingdom and that of natural gas, 22.5%. The oil and gas industry employed a total of 450,000 people in 2013 of which 36,000 were directly employed by exploration and production companies. The Buzzard oilfield in the Outer Moray Firth was the most prolific oilfield on the United Kingdom Continental Shelf (UKCS). The North Sea

holds Europe's largest natural gas and petroleum reserves. At the end of 2013, the United Kingdom's estimated proven crude oil reserves totaled 3.1 billion barrels, which was the largest within the EU; the reserves were located mostly offshore on the UKCS. Most of the country's production came from basins located east of Scotland in the central North Sea. The northern North Sea, east of the Shetland Islands, also contains considerable reserves, and smaller deposits are located in the North Atlantic Ocean. Besides these offshore assets, the country had the Wytch Farm field, which was the largest onshore oilfield in Europe (British Geological Survey, 2011, p. 75; 2015, p. 10, 14; U.S. Energy Information Administration, 2014).

Outlook

The energy and industrial minerals sectors seem likely to continue being the most salient in the minerals industry of the United Kingdom. The country's manufacturing industry will continue to rely on imported raw minerals owing to the lack of exploitation of these resources in the country. The United Kingdom's decrease in domestic production of crude petroleum is likely to continue and the production of steel will likely remain stable and continue to reflect international trends in demand.

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TABLE I
UNITED KINGDOM: PRODUCTION OF MINERAL COMMODITIES¹

(Metric tons unless otherwise specified)

Commodity	2009	2010	2011	2012	2013	
METALS						
Aluminum, metal:						
Primary	253,000	186,000	213,000	60,000	44,000	
Secondary	288,397	311,741	301,250	300,000 ^e	317,899	
Total	541,397	497,741	514,250 ^r	360,000	361,899	
Iron and steel:						
Metal:						
Pig iron	thousand metric tons	7,671	7,233	6,625	7,183	9,471
Steel:						
Crude	do.	10,079	9,709	9,478	9,579	11,858
Hot-rolled	do.	7,091	8,395	7,963	7,042	8,031
Lead:						
Mine output, Pb content ^e	300	300	300	100	--	
Metal:						
Smelter, bullion from imported concentrate ^e	36,000	36,000	36,000	36,000	36,000	
Refined: ^e						
Primary ²	135,000	151,000 ^r	125,000 ^r	157,000	137,000	
Secondary ³	144,000	144,000	144,000	155,000	155,000	
Total	279,000	295,000 ^r	269,000 ^r	312,000	292,000	
Nickel, metal ⁴	38,700	38,000	37,400	34,300	34,000 ^e	
INDUSTRIAL MINERALS						
Barite ⁵	36,000 ^e	33,000	31,000	30,000	30,000	
Cement, hydraulic	thousand metric tons	7,623 ^r	7,882 ^r	8,529 ^r	7,950 ^r	8,203
Clays:						
Fire clay	do.	129	110 ^r	162 ^{e,r}	96 ^r	100
Kaolin, china clay ⁶	do.	1,060 ^e	900	1,000	1,150	1,110
Ball clay and pottery clay ^{e,7}	do.	727 ⁸	1,000	1,000	750	740
Other, including shale	do.	5,310	5,934 ^r	6,154 ^{r,3}	5,497 ^r	5,600
Feldspar, china stone ^e	400	500	500	--	--	
Fluorspar, all grades ^{e,9}	19,000	26,000	--	--	30,000	
Gypsum and anhydrite ^e	thousand metric tons	1,200 ^r	1,200 ^r	1,200 ^r	1,200 ^r	1,200
Lime, hydrated and quicklime ^e	do.	1,500	1,500	1,500	1,500	1,500
Nitrogen, N content of ammonia ^e	do.	1,100	1,100	1,100	1,100	1,100
Potash, KCl product	700,000 ^r	700,000	770,000	900,000 ^r	1,000,000	
Salt, all kinds	thousand metric tons	6,166	6,666	6,060	6,152	6,700
Sand and gravel, common sand and gravel	do.	65,800	66,800	62,000	61,000	58,100
Sodium compounds, carbonate, n.e.s. ^{e,10}	do.	1,000	1,000	1,000	1,000	1,000
Stone:						
Chalk	do.	4,047	3,626	3,996	3,473 ^r	3,500
Dolomite	do.	3,164	4,540	4,490	4,896 ^r	5,000
Igneous rock	do.	44,618	44,876	44,400 ^r	40,200 ^r	40,400
Limestone	do.	60,111	60,207	57,930	54,800 ^r	55,000
Sandstone	do.	12,335	11,556	12,300 ^r	11,500 ^r	11,800
Slate, including fill	do.	683	695	763	701 ^r	710
Total	do.	124,958	125,500	123,879 ^r	115,570	116,410
Talc, soapstone, pyrophyllite	3,000	3,000	4,000	4,000	4,000	
Titanium, titanium dioxide ^e	thousand metric tons	200	200	200	200	200

See footnotes at end of table.

TABLE 1—Continued
 UNITED KINGDOM: PRODUCTION OF MINERAL COMMODITIES¹

(Metric tons unless otherwise specified)

Commodity		2009	2010	2011	2012	2013
MINERAL FUELS AND RELATED MATERIALS						
Coal, anthracite and bituminous	thousand metric tons	18,054	18,159	18,492	16,788	12,840
Coke: ^e						
Metallurgical	do.	4,000	4,000	4,000	4,000	4,000
Breeze, all types	do.	250	250	250	250	250
Gas, natural, marketable ¹¹	billion cubic meters	68	59	66	57 ^e	57 ^e
Peat ^e	cubic meters	887	1,004	825	900 ^{r, e}	1,000
Petroleum:						
Crude ¹²	thousand 42-gallon barrels	484,643	430,791	422,568	368,139	312,878
Refinery products	do.	578,014	565,422	565,000	530,300 ^r	530,000

^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 December 30, 2014.

²Produced entirely from imported bullion and includes the lead content of alloys.

³Includes a small quantity of primary lead from domestic concentrate.

⁴Refined nickel.

⁵Includes witherite.

⁶Sales, dry weight.

⁷Salable product.

⁸Reported figure.

⁹Proportions of grades not available; probably about two-thirds acid grade.

¹⁰Not elsewhere specified.

¹¹Methane, excluding gas flared or reinjected.

¹²Excludes gases and condensates.

TABLE 2
UNITED KINGDOM: STRUCTURE OF THE MINERAL INDUSTRY IN 2013

(Thousand metric tons unless otherwise specified)

Commodity	Major operating companies and major equity owners	Location of main facilities ¹	Annual capacity
Aluminum:			
Primary	Rio Tinto Alcan Ltd.	Lochaber smelter, Fort William County, Scotland	45
Secondary	Hydro Aluminium Deeside Ltd. (Hydro Aluminium AS)	Wrexham, Clwyd County, Wales	60
Do.	Cohen Alloys Ltd.	Glasgow, Scotland	NA
Do.	Coleshill Aluminium Ltd.	Coleshill, Warwickshire, England	NA
Barite	M-I Drilling Fluids (UK) Ltd.	Foss Mine, near Aberfeldy, Perthshire County, Scotland	50
Do.	Glebe Mines Ltd. (care-and-maintenance status since the beginning of 2011)	Arthurton West, Bow Rake, High Rake, and Watersaw Mines, Southern Pennine Orefield, Derbyshire, England	15
Cement	Lafarge Cement UK, Ltd. (Lafarge Group)	Aberthaw plant, East Aberthaw, Barry, South Glamorgan County, Wales	500 ²
Do.	do.	Barnstone plant, near Langar, Nottinghamshire, England	--
Do.	do.	Cauldon plant, near Leek, Staffordshire, England	1,000
Do.	do.	Cookstown plant, Cookstown, County Tyrone, Northern Ireland	500
Do.	do.	Dunbar plant, Dunbar, East Lothian, Scotland	1,000
Do.	do.	Northfleet plant, Northfleet, Kent County, England	1,000
Do.	do.	Westbury plant Westbury, Wiltshire, England	700
Do.	Castle Cement Ltd. (HeidelbergCement AG, 100%)	Ketton plant, Rutland County, near Stamford, Lincolnshire, England	1,400
Do.	do.	Padeswood plant, Mold, Flintshire County, Wales	1,400
Do.	do.	Ribblesdale plant, Clitheroe, Lancashire, England	1,400
Do.	CEMEX UK Operations, Ltd. (CEMEX, S.A.B. de C.V., 100%)	Rugby plant, Rugby, Warwickshire, England	1,800
Do.	do.	Barrington plant, Barrington, Cambridgeshire, England	300
Do.	do.	South Ferriby plant, North Lincolnshire, England	800
Do.	Lafarge Tarmac Cement and Lime Ltd.	Tunstead plant, Buxton, Derbyshire, England	800
Clay:			
Ball clay	WBB Minerals (S.C.R.-Sibelco NV)	Various operations in northern and southern Devon County, England	500
Do.	Imerys Group	Operations in Bovey and Wareham Basins, Dorset County, England	300
China clay (kaolin)	do.	Mines and plants in Cornwall and Devon Counties, England	3,000
Do.	WBB Minerals (S.C.R.-Sibelco NV)	Mines and plants in Cornwall County, England	1,000
Coal:			
Underground mines	UK Coal Production Ltd.	Operations in England include the Kellingley Colliery, North Yorkshire, and the Thoresby Colliery, Nottinghamshire, England	30,000
Surface pits	Celtic Energy Ltd.	Nant Helen Extension pit, Abercraf, West Glamorgan, Wales	400
Do.	do.	Selar pit, Glynneath, West Glamorgan, Wales	400
Do.	Energybuild Ltd.	Nant-y-Mynydd pit, Neath, West Glamorgan, Wales	130
Fluorspar	British Fluorspar Ltd. (Fluorsid Group, 100%)	Mill at Stoney Middleton, mines in Derbyshire, England	60
Gold	kilograms Galantas Gold Corp.	Omagh Mine, near Omagh, County Tyrone, Northern Ireland	900 ³

See footnotes at end of table.

TABLE 2—Continued
 UNITED KINGDOM: STRUCTURE OF THE MINERAL INDUSTRY IN 2013

(Thousand metric tons unless otherwise specified)

Commodity		Major operating companies and major equity owners	Location of main facilities ¹	Annual capacity
Gypsum		British Gypsum Ltd. (Saint-Gobain S.A. 100%)	Several mines and quarries in England, which include the Barrow Mine, Barrow upon Soar, southeast of Loughborough, Leicestershire; the Brightling Mine, Robertsbridge, East Sussex County; the Birkshead Mine, Kirby Thore, near Penrith, Cumbria County; the Fauld Mine, Tutbury, near Burton on Trent, Staffordshire; the Kilvington Quarry, Staunton in the Vale, Kilvington, Nottinghamshire; the Marbleegis Mine, East Leake, northeast of Loughborough, Leicestershire; the Newbiggin Mine, Newbiggin, near Kirby Thore, Cumbria County, England	3,500
Lead:				
Primary		Britannia Refined Metals Ltd. (Glencore plc)	Northfleet, Kent County, England	180
Secondary		Britannia Recycling Ltd. (Glencore plc)	Wakefield, West Yorkshire, England	20
Do.		H.J. Enthoven Ltd. (Quexco Inc., 100%)	Darley Dale, Derbyshire, England	75
Natural gas	billion cubic meters	Numerous domestic and international oil companies	North Sea gasfields	100
Nickel, refined		Vale Europe Ltd. (Vale S.A.)	Clydach Refinery, near Swansea, West Glamorgan County, Wales	30
Nitrogen, N content of ammonia		GrowHow UK Ltd. (Kemira GrowHow Oyj)	Ince, Lancashire, England	400
Petroleum:				
Crude	million 42-gallon barrels per day	Numerous domestic and international oil companies, which include Apache North Sea Ltd., BG Group, BHP Billiton Ltd., BP p.l.c., Challenger Minerals Inc., Chevron Corp., ConocoPhillips Corp., Dana Petroleum plc, Eni S.p.A., Exxon Mobil Corp., Hess Corp., Lundin Britain Ltd., Maersk Oil UK Ltd., Marathon Oil U.K. Ltd., Midmar Energy Onshore Ltd., Nexen Petroleum Inc., Noble Energy (Europe) Ltd., Oilexco Inc., Perenco UK Ltd., Petro-Canada UK Ltd., Premier Oil plc, Royal Dutch Shell plc, Statoil (U.K.) Ltd., Talisman Ltd., Total S.A., and Tullow Oil (U.K.) Ltd.	North Sea oilfields	2
Refined	million 42-gallon barrels	Exxon Mobil Corp.	Fawley refinery, Southampton, Hampshire, England	120
Do.	do.	Essar Energy plc	Stanlow manufacturing complex, Ellesmere Port, Cheshire, England	100
Do.	do.	ConocoPhillips Co.	Humber refinery, South Killingholme, North Lincolnshire, England	90
Do.	do.	Total S.A.	Lindsey refinery, Killingholme, North Lincolnshire, England	85
Do.	do.	Valero Energy Corp.	Pembroke refinery, Pembroke, Dyfed County, Wales	82
Do.	do.	Ineos Group	Grangemouth refinery, Grangemouth, Stirling County, Scotland	80
Do.	do.	Total S.A., 70%, and Murco Petroleum Ltd., 30%	Milford Haven, Dyfed County, Wales	40
Do.	do.	Eastham Refinery Ltd. (Shell UK Ltd., 50%, and AB Nynas Ltd., 50%)	Eastham refinery, Ellesmere Port, Cheshire, England	9
Do.	do.	AB Nynas Ltd.	Dundee refinery, Dundee, Scotland	4
Platinum-group metals		Johnson Matthey plc	Refineries at Enfield (London) and Royston, Hertfordshire, England	NA
Do.		Vale Acton (Vale Group).	Acton refinery, London, England	NA
Potash		Cleveland Potash Ltd. (Israel Chemicals Ltd., 100%)	Boulby Mine, Yorkshire, England	1,000

See footnotes at end of table.

TABLE 2—Continued
UNITED KINGDOM: STRUCTURE OF THE MINERAL INDUSTRY IN 2013

(Thousand metric tons unless otherwise specified)

Commodity	Major operating companies and major equity owners	Location of main facilities ¹	Annual capacity
Salt:			
Road	British Salt Ltd.	Middlewich, Cheshire, England	800
Rock	do.	do.	600
Do.	Irish Salt Mining and Exploration Co. Ltd.	Kilroot Mine, Carrick Fergus, Northern Ireland	500
Sand and gravel	Hanson plc (HeidelbergCement AG, 100%)	Various offshore and onshore locations	NA
Silica sand	WBB Minerals (S.C.R.-Sibelco NV)	Various operations in Cheshire, Humberside, and Norfolk Counties, England	5,000
Do.	Hanson plc	Various locations	NA
Slate, natural	Carillion Plc.	Operations in Wales include the Penrhyn quarry, Bethesda, Conwy County; the Pen Yr Orsedd quarry, Nantlle, Gwynedd County; quarries at Blaenau Ffestiniog and Cwt y Bugail, Gwynedd County	1,000
Do.	Greaves Welsh Slate Company Ltd.	Llechwedd Slate Mines, Blaenau Ffestiniog, Gwynedd County, Wales	NA
Soda ash	Brunner Mond Group (Tata Chemicals Ltd.)	Northwich, Cheshire County, England	900
Steel	Tata Steel Europe (Tata Steel Group)	Scunthorpe Works, Scunthorpe, Lincolnshire, England	4,500
Do.	Tata Steel Europe Teesside Cast Products (Tata Steel Group)	Teesside Works, Redcar, Cleveland County, England	3,900
Do.	Tata Steel Europe Strip Products UK (Tata Steel Group)	Port Talbot works, Port Talbot, West Glamorgan, Wales	3,750
Do.	Tata Steel Europe Engineering Steels (Tata Steel Group)	Rotherham Works, Rotherham, South Yorkshire, England	1,200
Do.	do.	Stocksbridge Works near Sheffield, South Yorkshire, England	NA ⁴
Do.	Tata Steel Europe Special Profiles (Tata Steel Group)	Skinningrove, Carlin How, near Saltburn-by-the-Sea, Cleveland County, England	NA
Do.	Celsa Manufacturing Ltd. (Grupo Celsa, 100%)	Tremorfa Works, Cardiff, South Glamorgan County, Wales	850
Stone, crushed	Hanson plc	90 quarries in various locations	70,000
Strontium minerals, celestite	Bristol Minerals Co. Ltd.	Yate, Avon County, England	30
Do.	Hope Construction Materials Ltd.	Hope plant, Hope Valley, Derbyshire, England	1,300
Tin, ore	Celeste Mining Corp.	South Crofty Mine, Cornwall County, England	400

Do., do. Ditto. NA Not available. -- Zero.

¹May include historic, postal, or preserved counties instead of current regional governments, such as cities, county boroughs, or unitary authorities.

²Grinding plant only. Kilns closed in May 2006.

³Under construction.

⁴Remelt facilities.