

THE MINERAL INDUSTRIES OF BELGIUM AND LUXEMBOURG

By Harold R. Newman

BELGIUM

Belgium has a highly developed market economy and is located at the heart of one of the world's most highly developed industrialized regions. The country had a diversified industrial and commercial base. Belgium developed an excellent transportation infrastructure of canals, highways, ports, and railways to integrate its industry with that of its neighbors.

Belgium has an area of 30,521 square kilometers (km²) and borders the North Sea for 65 kilometers (km). In 2003, Belgium's gross domestic product (GDP) at purchasing power parity valuation was \$286 billion and per capita income was \$28,280. The annual growth rate was 1.5% in real terms. The unemployment rate was 8% (International Monetary Fund, 2004§¹).

The geologic deposits in Belgium are almost exclusively of sedimentary origin and range in age from Upper Cambrian to Recent. Coal-bearing formations of Carboniferous age have been preserved along the Sambre-Meuse Valley. Mesozoic deposits have not been particularly deformed and occur mostly in subhorizontal layers, Triassic and Jurassic deposits are limited in distribution, and Cretaceous deposits attain a thickness of more than 300 meters. Paleocene and Eocene deposits are represented by clays and sands in northern and central Belgium, and Quaternary, gravels, loams, loess, and sands cover parts of middle Belgium (Council of Governments, 2003§).

Mining has been much less important than it was in the past. The deposits of iron ore, lead, and zinc were exhausted and coal mining ceased in 1992 owing to high production costs.

Although the country is small, Belgium has a developed industrial minerals sector. The country was a producer of such industrial materials as carbonates, which included dolomite and limestone; construction materials; and silica sand.

The mineral-processing industry was a significant contributor to the Belgian economy in 2003. The refining of copper, zinc, and minor metals and the production of steel, which were all from imported materials, were the largest mineral industries in Belgium. The extraction and recovery of nonferrous metals were carried out in large-scale high-technology plants. Europe's largest electrolytic copper and zinc refineries were in Belgium, as was one of the continent's largest lead refineries. The country was also a producer of cadmium, germanium, selenium, and tellurium as byproducts from smelting and refining operations.

Production of mineral commodities generally remained stable during 2003. As in the past, any increases in production generally followed the lines of exported goods, such as value-added nonferrous metals (table 1).

¹References that include a section mark (§) are found in the Internet References Cited sections.

Table 2 lists the principal mining and mineral-processing facilities in Belgium with their locations and capacities.

Environmental programs and policies in Belgium were the responsibility of the Federal Ministry of the Environment and its comparable ministries in Flanders and Wallonia, which are two separate regions of the country. Environmental programs ranged from treating oil effluent to reducing air-pollution emissions. The country was a significant producer of greenhouse gases and industrial emissions that caused acid rain; these emissions have decreased since the country implemented programs to address the problem. Belgium was party to international agreements that concerned air and water pollution, biodiversity, climate control, endangered species, hazardous wastes, ozone layer protection, and wetlands protection (MSN Encarta, 2003§).

Belgium had a highly developed market economy and was heavily reliant on international trade. The country's GDP was dominated by a very large service sector (more than 70% of GDP) followed by manufacturing (26%) and agriculture (1.4%). Exports accounted for more than 74% of Belgium's GDP, which made it one of the highest per capita exporters in the world. More than 76% of Belgium's exports went to other member-states of the European Union (EU). In 2003, more than 8% of Belgium's imports came from the United States. The country ranked as the 11th largest commercial power worldwide and was the 9th largest trading partner of the United States (U.S. Commercial Service, 2004§).

Belgium, the Netherlands, and Luxembourg form the BENELUX customs unit. Since 1921, the economic union between Belgium and Luxembourg, which is known as the Belgium-Luxembourg Economic Union (BLEU), has involved the parity of currency, integrated foreign trade (including statistics), a balance-of-payments account, and a joint central bank. International trade data for Belgium are covered in the context of the BLEU and, as such, also cover the exports, reexports, and imports of Luxembourg. Other member-states of the EU were the BLEU's most important trading partners.

The Arcelor Group, which was the world's largest steel producer in 2003, announced a restructuring plan that involved the closure of six smelting furnaces in Europe, which included two Cockerill Sambre SA sites in Leige, by 2010. In the case of Cockerill Sambre, the entire hot phase, which included hot rolling, was to be closed by 2006. After negotiations with the Wallonia regional government and trade unions, however, Arcelor announced that it would delay closure until 2010 (European Foundation, 2003a§).

Arcelor was preparing to implement the Carinox project, which involved the construction of a new continuous-casting steelworks upstream from the wide-sheet mill in Carlam. It represented an investment of \$270 million. The plant's production of 1 million metric tons per year (Mt/yr) was

expected to start in the second half of 2005 and to reach maximum capacity in 2007 (European Foundation, 2003b§).

Sidmar NV was one part of Arcelor's flat carbon steel operational units. Production capacity increased to 4.5 Mt/yr in 2003 after relining and upgrading of the company's two blast furnaces was completed. To maintain the 5.5-Mt/yr capacity of the hot-strip mill, Sidmar bought additional slab steel that it obtained mostly from other Arcelor units (Metal Bulletin Monthly, 2003).

The diamond district of Antwerp, which comprised 4 exchanges and 1,500 diamond companies, was the most important diamond distribution center in the world. Trade in polished diamond exceeded \$13 billion in 2003. Exports of polished diamond rose by 11.9% to reach \$7.9 billion from \$6.4 billion in 2002 (table 3); imports of polished diamond are listed in table 4. The United States remained the most important export market for cut diamond and accounted for \$2.6 billion. The diamond sector accounted for 8% of Belgium's total exports (Diamond High Council, 2004).

Belgium, which has been an important producer of marble for more than 2,000 years, was recognized for the diversity and quality of its dimension stone. A dark blue-gray crinoidal limestone, which is referred to as "petit granit," was one of the most important facing stones that the country produced. All the marble quarries are in Wallonia. Black, gray, and red were the principal color ranges of the marble, most of which was exported.

Les Carrières de la Pierre Bleue Belge S.A., which was formed in September 2003, was the product of the change of name of Clypot S.A. and the takeover of the industrial side of Carrières Gauthier-Wincqz S.A. Les Carrières controlled two of the three blue limestone (petit granit) quarries in Belgium (Les Carrières de la Pierre Bleue Belge S.A., 2003§).

When the last Belgian coal mines closed in 1992, the country became entirely dependent on imported primary energy. Belgium imported coal to meet the needs of the cement and power-generating industries and steel and crude oil for its four petroleum refineries. Belgium's seven nuclear powerplants supplied more than one-half of its electricity needs. Natural gas, which was considered to be a more environmentally acceptable fuel, has begun to play a more important role as an energy source. With Belgium at the center of the European gas grid, the country was favorably located for obtaining natural gas.

Petroplus S.A. purchased the bitumen plant on the site of its Antwerp refinery from Nynas AG of Sweden. The two facilities, which formed a single refinery until the mid-1980s, were to be reintegrated. Petroplus also concluded a bitumen supply contract with Nynas (Petroleum Economist, 2003).

The four ports in Flanders (Antwerp, Ghent, Ostend, and Zeebrugge), which are all within 100 km of each other, were leading players in international and intra-European cargo handling. The seaport of Antwerp was a particularly important link in the chain of international trade. Antwerp was 1st for steel products; the 2nd largest port in Europe after Rotterdam, The Netherlands, the 4th largest port in the world, and the 10th largest for container traffic. Zeebrugge was one of Europe's largest gas terminals and a major port for liquefied natural gas imports.

Belgium is expected to remain a major diamond trader and a leading player in international and intra-European cargo handling.

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LUXEMBOURG

In 2003, Luxembourg's mineral industry consisted principally of information systems, mineral trading, and raw materials processing.

Mining in Luxembourg was represented by small industrial mineral operations that produced material for domestic consumption. These minerals included dolomite, limestone, sand and gravel, and slate (table 1). Luxembourg's principal producers of industrial mineral industry products are listed in table 2.

Luxembourg has an area of 2,586 km² and had a population of 454,000. The country's GDP at purchasing power parity valuation was \$27 billion, and per capita income was \$57,370. The annual growth rate was 1.4% in real terms. The unemployment rate was 4% (International Monetary Fund, 2004§).

As a member of the BLEU, trade statistics for Luxembourg are inextricably linked with those of Belgium and, therefore, cannot be listed individually. The iron and steel industry was Luxembourg's most important mineral industry sector; steel was the country's main export commodity.

Acieries Reunies de Burbach-Eich-Dudelang (ARBED) dominated the country's mineral industry and was the major producer of crude steel, pig iron, and stainless steel, all of which were produced from imported material. The company specialized in the production of large architectural steel beams and was also involved in other areas of the economy, such as the brickmaking and cement industries. ARBED's domestic and foreign subsidiaries had interests in cement, copper foil production, engineering, mining, and in steelmaking and steel products.

In January 2002, ARBED merged with the Usinor Group of France and Aceralia S.A. of Spain to form the Arcelor Group, which was the world's largest steel company in 2003. Arcelor was focusing its activities on four sectors—flat carbon steel products, long carbon steel products, stainless steel products, and distribution, processing, and trading. The total combined annual production of the Group was 40 million metric tons (Mt) (Arcelor Group, 2003§).

Luxembourg is expected to continue as a major producer and exporter of steel with industrial mineral production limited to domestic consumption.

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Arcelor Group, 2003, Steel solutions for a better world, accessed May 10, 2004, at URL <http://www.arcelor.com/index.php?page=49&lngId=1&template=165&onload=print%28>.

International Monetary Fund, 2004 (April), Luxembourg, World Economic Outlook Database, accessed May 3, 2004, via URL <http://www.imf.org/external/pubs/ft/weo/2004/01/data/index.htm>.

Major Sources of Information

Institute National de Statistiques
Rue de Louvain 44
1000 Brussels, Belgium

Service Geologique de Belgique
Rue Jenner 13
1040 Brussels, Belgium

Service Central de la Statistique et des Études Economiques (STATEC)
6 Boulevard Royal
2013 Luxembourg

TABLE 1
BELGIUM AND LUXEMBOURG: PRODUCTION OF MINERAL COMMODITIES¹

(Metric tons unless otherwise specified)

Country and commodity	1999	2000	2001	2002	2003
BELGIUM ²					
Metals:					
Aluminum, secondary including unspecified metals ^c	1,000	1,000	500	500	300
Arsenic, white ^e	1,500	1,500	1,500	1,500	1,200
Bismuth, metal ^c	700	700	700	700	600
Cadmium, primary	1,235	1,148	1,236	117 ^{r, e}	120
Cobalt, primary ^c	950	1,110	1,090	1,135 ^{r, 3}	1,704 ³
Copper:					
Blister, secondary	143,300	144,700	138,200 ^r	125,500 ^r	125,000
Unwrought, total, primary and secondary including alloys ^c	485,000	485,000	475,000	483,978 ^{r, 3}	485,000
Refined, primary and secondary including alloys ^c	388,000	423,100 ³	425,000	423,000 ^r	425,000
Iron and steel:					
Pig iron	8,431	8,472	7,732	8,053 ^r	8,000
thousand tons					
Steel:					
Crude	10,931	11,635	10,763	11,495 ^r	11,500
do.					
Hot-rolled products	12,780	13,689	12,770	12,000 ^e	12,000
Lead, refined:					
Primary ^{e, 4}	82,900 ³	98,000	80,000	70,000 ^r	80,000
Secondary ⁵	20,300	20,000	16,000	20,000 ^e	20,000
Total ^c	103,200 ³	118,000	96,000	90,000 ^r	100,000
Selenium ^c	200	200	200	200	200
Tin, metal, secondary including alloys ^c	8,100	8,500	8,000	5,000	5,000
Zinc: ^e					
Slab:					
Primary	230,500 ³	224,000 ³	225,000 ³	225,000	230,000
Secondary, possibly remelted zinc	28,000	28,000	30,000	35,000	35,000
Total	259,000	252,000	255,000	260,000	265,000
Powder	30,000	30,000	25,000	25,000	20,000
Industrial minerals:					
Barite ^c	30,000	30,000	30,000	30,000	30,000
Cement, hydraulic ^c	8,000	8,000	8,000	8,000	8,000
thousand tons					
Clay, kaolin ^c	300	300	300	300	300
do.					
Lime and dead-burned dolomite, quicklime ^c	1,750	1,750	1,750	1,700	1,700
do.					
Nitrogen, N content of ammonia	850 ^e	863	860 ^e	842 ^r	850
do.					
Sodium sulfate ^c	250	250	250	250	250
do.					
Stone, sand and gravel: ^c					
Calcareous:					
Alabaster	1,200	1,200	1,200	1,200	1,200
Dolomite	3,500	3,500	3,500	3,500	3,500
thousand tons					
Limestone	30,000	30,000	30,000	30,000	30,000
do.					
Marble:					
In blocks	300	300	300	300	300
Crushed and other	100	100	100	100	100
cubic meters					
Belgian bluestone, petit granit:					
Quarried	1,200	1,200	1,200	1,200	1,200
thousand cubic meters					
Sawed	100,000	100,000	100,000	100,000	100,000
do.					
Worked	15,000	15,000	15,000	15,000	15,000
do.					
Crushed and other	800,000	800,000	800,000	800,000	800,000
do.					
Porphyry, all types	4,000	4,000	4,000	4,000	4,000
thousand tons					
Quartz and quartzite	500,000	500,000	500,000	500,000	500,000
do.					
Sandstone:					
Rough stone including crushed	2,400	2,400	2,400	2,400	2,400
thousand tons					
Paving	14,000	14,000	14,000	14,000	14,000
do.					
Sand and gravel:					
Sand:					
Construction	8,500	8,500	8,500	8,500	8,500
thousand tons					
Foundry	500,000	500,000	500,000	500,000	500,000
do.					
Dredged	2,000	2,000	2,000	2,000	2,000
thousand tons					
Glass	1,800	1,800	1,800	1,800	1,800
do.					

See footnotes at end of table.

TABLE 1--Continued
BELGIUM AND LUXEMBOURG: PRODUCTION OF MINERAL COMMODITIES¹

(Metric tons unless otherwise specified)

Country and commodity	1999	2000	2001	2002	2003
BELGIUM--Continued ²					
Industrial minerals--Continued:					
Stone, sand and gravel--Continued: ^e					
Sand and gravel--Continued:					
Sand--Continued:					
Other	2,800	2,800	2,800	2,800	2,800
Gravel, dredged	5,000	5,000	5,000	5,000	5,000
Sulfur: ^e					
Byproducts:					
Elemental	228,000	230,000 ³	230,000	225,000	225,000
Other forms	180,000	180,000 ³	180,000	175,000	175,000
Total	408,000	410,000 ³	410,000	400,000	400,000
Sulfuric acid, oleum	2,000	2,000	2,000	2,000	2,000
Mineral fuels and related materials:					
Carbon black ^c	1,000	1,000	1,000	1,000	1,000
Coke, all types ^c	3,400	3,400	3,222 ³	3,200	3,200
Gas, manufactured ^c	375,000	375,000	375,000	375,000	375,000
Petroleum refinery products:					
Liquefied petroleum gas	6,113	8,758	9,000 ^e	9,000 ^e	9,000 ^e
Naphtha and white spirit	13,656	17,213	16,000 ^e	16,000 ^e	16,000 ^e
Gasoline	51,281	45,152	50,000 ^e	50,000 ^e	50,000 ^e
Jet fuel	16,952	18,544	18,000 ^e	18,000 ^e	18,000 ^e
Distillate fuel oil	87,483	93,086	90,000 ^e	90,000 ^e	90,000 ^e
Refinery gas ^e	3,500	3,500	3,500	3,500	3,500
Residual fuel oil	41,998	49,557	50,000 ^e	50,000 ^e	50,000 ^e
Bitumen ^c	5,000	5,000	5,000	5,000	5,000
Other ^c	8,500	8,500	10,000	10,000	10,000
Refinery fuel and losses ^c	12,000	12,000	10,000	10,000	10,000
Total ^c	246,000	261,000	262,000	262,000	262,000
LUXEMBOURG ⁶					
Metals, steel:					
Crude	2,427,000	2,571,000	2,725,000	2,736,000 ^r	2,700,000
Semimanufactures	2,775,000	3,019,000	2,974,000	2,800,000	2,800,000
Industrial minerals:					
Cement, hydraulic	742,040	750,000 ^e	725,000	700,000 ^e	700,000 ^e
Gypsum and anhydrite, crude ^e	400	400	400	400	400
Phosphates, Thomas slag: ^e					
Gross weight	475,000	475,000	475,000	475,000	475,000
P ₂ O ₅ content	70,000	70,000	70,000	70,000	70,000

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

¹Table includes data available through March 2004.

²In addition to the commodities listed, Belgium produced a number of other metals and alloys, for which only aggregate output figures were available.

³Reported figure.

⁴Data not reported; derived by taking reported total lead output plus exports of lead bullion less imports of lead bullion.

⁵Data represent secondary refined lead output less remelted lead. As such, the figures are probably high because they include some lead that was sufficiently pure as scrap that did not require remelting, but data are not adequate to permit differentiation.

⁶Construction materials, such as dimension stone and sand and gravel, are also reproduced, but the amounts are no longer reported, and no basis exists for the formulation of reliable estimates of output levels.

TABLE 2
BELGIUM AND LUXEMBOURG: STRUCTURE OF THE MINERAL INDUSTRIES IN 2003

(Thousand metric tons unless otherwise specified)

Country and commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity
BELGIUM				
Cadmium, metal	metric tons	Umicore (Sté. Générale de Belgique, 50.2%)	Balen	1,800
Cement		Cimenteries CBR SA (Sté. Générale de Belgique)	Plants at Lixhe, Mons/Obourg, Harmignies, Marchienne, Ghent, and other locations	3,200
Do. ¹		Ciments d'Obourg SA	Plants at Obourg and Thieu	2,800
Do.		Compagnie des Ciment Belge (Ciments Francais)	Plant at Gaurain-Ramecroix	2,400
Cobalt	metric tons	Umicore (Sté. Générale de Belgique, 50.2%)	Refinery at Olen	500
Copper		do.	Smelter at Antwerp-Hoboken	50
Do.		do.	Refinery at Olen	330
Do.		Metallo-Chimique NV	Smelter at Beerse	80
Dolomite		SA Dolomeuse (Group Lhoist)	Quarry at Marche les Dames	500
Do.		do.	Plant at Marche les Dames	750
Do.		SA de Marche-les-Dames (Group Lhoist)	Quarries at Namèche	3,000
Do.		do.	Plant at Namèche	3,000
Do.		SA Dolomies de Merlemont (Group Lhoist)	Quarry at Philippeville	100
Lead, metal		Umicore (Sté. Générale de Belgique, 50.2%)	Smelter at Antwerp-Hoboken	90
Do.		do.	Refinery at Antwerp-Hoboken	125
Limestone		Carmeuse S.A. (Long View Investment NV)	Mines and plant at Engis	1,850
Do.		do.	Mines and plant at Frasnes	450
Do.		do.	Mines and plant at Maizeret	850
Do.		do.	Mines and plant at Moha	800
Do.		SA Transcar (Royal Volker Stevin)	Mines and plant at Maizeret	850
Petroleum, refined	42-gallon barrels per day	TotalFina S.A.	Refinery at Antwerp	268,000
Do.	do.	SA Esso NV	do.	239,000
Do.	do.	Belgian Refining Corp.	do.	80,000
Do.	do.	Nynas Petroleum NV	do.	125,000
Salt		Zoutman NV	Plant at Roeselare	200
Sand, silica		SRC-Sibelco SA	Mines and plants at Lommel, Mol, and Maasmechelen	500
Steel		Cockerill Sambre SA (Government of Wallonia, 80%)	Plants at Liège and Charleroi	5,000
Do.		Sidmar NV (Belgian Government, 28.24%, and Arcelor Group, 71.76%)	Plant at Ghent	3,960
Do.		Usines Gustave Boël NV	Plant at La Louviere	2,020
Do.		Forges de Clabecq SA	Plant at Clabecq	1,500
Do.		SA Fabrique de Fer de Charleroi	Plant at Charleroi	600
Do.		ALZ NV	Plant at Genk-Zuid	360
Do.		New Tubemeuse (NTW) SA	Plant at Flemalle	300
Zinc, metal		Umicore (Sté. Générale de Belgique, 50.2%)	Smelter and refinery at Balen	450
LUXEMBOURG				
Cement		SA des Ciments Luxembourgeois [Aciéries Reunies de Burbach-Eich-Dudelange (ARBED), 50%, and Sté. Générale de Belgique (SGB), 25%]	Plant at Esch-sur-Alzette	450
Do.		Intermoselle SARL [Aciéries Reunies de Burbach-Eich-Dudelange (ARBED), 33%]	Plant at Rumelange	1,000
Steel		Arcelor Group	Plants at Differdange, Dudelange, Esch-Belval, Esch-Schiffange	5,320

¹Includes the capacity of the company SA Ciments de Haccourt.

TABLE 3
BELGIUM: EXPORTS AND REEXPORTS OF POLISHED DIAMOND

Country	2003		Percentage difference 2002		Percentage of total	
	Dollars	Carats	Dollars	Carats	Dollars	Carats
United States	\$2,592,381,683	2,041,375	13.51%	-0.03%	36.07%	20.29%
Hong Kong	893,003,945	1,884,993	16.28%	47.61%	12.43%	18.74%
Israel	778,808,126	879,807	32.63%	13.66%	10.84%	8.76%
Italy	426,226,334	971,974	7.62%	-5.71%	5.92%	9.66%
Switzerland	385,620,276	589,143	-1.06%	-3.05%	5.37%	5.86%
United Kingdom	344,049,920	323,427	-0.85%	7.76%	4.79%	3.22%
Japan	276,761,490	325,275	28.35%	26.56%	3.85%	3.23%
United Arab Emirates	255,243,708	482,055	0.46%	-1.29%	3.55%	4.79%
France	222,965,636	391,289	-14.07%	-15.68%	3.10%	3.89%
Germany	141,938,260	276,702	-10.41%	-13.58%	1.98%	2.76%
Others	869,132,090	1,894,089	12.09%	18.83%	12.10%	18.80%
Total	\$7,186,131,468	10,060,129	11.88%	8.88%	100.00%	100.00%

Source: Diamond High Council, Antwerp, May 2004.

TABLE 4
BELGIUM: IMPORTS OF POLISHED DIAMOND

Country	2003		Percentage difference 2002		Percentage of total	
	Dollars	Carats	Dollars	Carats	Dollars	Carats
United States	\$1,301,397,558	800,525	7.27%	-0.78%	20.33%	8.38%
India	981,462,673	3,036,726	5.55%	-6.67%	15.60%	31.77%
Israel	675,867,254	546,586	15.60%	11.70%	10.48%	5.72%
Hong Kong	557,350,667	731,878	19.45%	4.32%	8.70%	7.66%
China	461,115,457	917,286	22.73%	15.04%	7.20%	9.60%
Russia	384,051,486	445,850	53.90%	70.45%	6.00%	4.66%
Switzerland	339,173,937	292,654	8.99%	4.50%	5.30%	3.06%
United Arab Emirates	248,232,520	517,655	72.61%	81.77%	3.88%	5.42%
Thailand	187,789,674	389,813	15.11%	-1.43%	2.93%	4.08%
Italy	186,326,806	392,322	8.72%	-2.49%	2.91%	4.10%
Others	1,079,943,504	1,486,288	N/A	N/A	16.67%	15.55%
Total	\$6,402,711,536	9,557,583	12.75%	4.12%	100.00%	100.00%

Source: Diamond High Council, Antwerp, May 2004.