



# 2005 Minerals Yearbook

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## BELGIUM AND LUXEMBOURG

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# 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 diversified industrial and commercial bases. Belgium also had an excellent transportation infrastructure of canals, highways, ports, and railways that it had developed to integrate its industry with that of its neighbors.

Mining was less important than in the past. In 2005, Belgium had a well developed industrial minerals sector and was a producer of industrial materials, such as carbonates, and construction materials, such as dolomite, limestone, and silica sand. The trading of diamond and the processing of minerals and metals were the main activities in the mineral industry.

Belgium has an area of 30,530 square kilometers (km<sup>2</sup>) and borders France, Germany, Luxembourg, the Netherlands, and the North Sea. It is one of the smallest countries in Europe with an east-west extent of 290 kilometers (km) and a north-south extent of 235 km (U.S. Central Intelligence Agency, 2006§<sup>1</sup>).

In 2005, Belgium's gross domestic product (GDP) based on purchasing power parity was \$325 billion, and the per capita income was \$31,244. The annual growth rate was 2.5% in real terms. The unemployment rate was 8.4%. The country's GDP was dominated by a very large service sector that accounted for more than 70% of the GDP (International Monetary Fund, 2006§).

The mineral-processing industry was a significant contributor to the Belgian economy in 2005. The refining of copper, zinc, and minor metals, and the production of steel were the leading mineral industries in Belgium. The processing and recovery of nonferrous metals were carried out in large-scale high-technology plants. In terms of capacity, Europe's leading electrolytic copper and zinc refineries and one of its leading lead refineries were located in Belgium. The country was also a producer of cadmium, germanium, selenium, and tellurium as byproducts from base metals smelting and refining operations, and its chemical industry led the world in the production of cobalt and radium salts (Link2exports, 2005§).

Production of mineral commodities generally remained stable during 2005 (table 1). 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 Direction Générale Environnement (Directorate General of the Environment) and its comparable departments in Flanders and Wallonia, which were two separate regions of the country. Environmental programs ranged from treating oil effluent to reducing air-polluting emissions. The

environment was exposed to intense pressures from human activities—urbanization, a dense transportation network, and extensive animal breeding and crop cultivation. Natural hazards included flooding along rivers and in areas of reclaimed coastal land (U.S. Central Intelligence Agency, 2006§).

Belgium was heavily reliant on international trade. The Belgium-Luxembourg Economic Union (BLEU) was involved in the parity of currency, integrated foreign trade (including statistics), a balance-of-payment account, and a joint central bank. International trade data was covered in the context of BLEU and, as such, covered the exports, reexports, and imports of both Belgium and Luxembourg. Belgium, the Netherlands, and Luxembourg (BENELUX) comprise the BENELUX custom unit. The BENELUX encompasses a population of 25 million, and 22% of U.S. exports to the European Union (EU) go to the BENELUX. Exports accounted for more than 74% of Belgium's GDP, which made it one of the highest per capita exporters in the world (U.S. Commercial Service, 2005§).

In 2005, Belgium's exports and reexports totaled \$333.5 billion and imports totaled \$319.8 billion, of which trade with other EU countries accounted for \$254.8 billion of the exports and \$229.2 billion of the imports. Germany was Belgium's top customer; the United States was fifth (Belgium Foreign Trade Agency, 2006§).

N.V. Umicore S.A. was an international metals and materials group. Its activities were centered on four business areas: advanced materials, precious metals products and catalysts, precious metals services, and zinc specialities. In early 2005, Umicore decided to move part of Umicore's copper operations into a new company called N.V. Cumerio S.A. The intention to spinoff Umicore's copper activities into a separate listed company was in line with Umicore's strategy to focus on specialty materials and follows the successful turnaround of Umicore's copper division, which included the Olen refinery. Umicore has made significant investment in its copper division in recent years, which has resulted in Cumerio having low-cost state-of-the-art assets (Mining Journal, 2005).

The Central Bank of Belgium announced that it had sold 30 metric tons (t) of gold in July and August. These gold sales took place within the framework of the Central Bank Gold Agreement that was concluded between 15 European central banks. The bank reported that it had 227.7 t of gold remaining after the sale and that there was no plan to sell any more gold in 2005 (Mining News, The, 2005§).

Mittal Steel N.V. announced that it had made a \$23 billion bid for its closest rival, Arcelor S.A., which would create the world's first 100-million-metric-ton (Mt)-plus steel producer. A combination of the two companies would give Mittal control of an estimated 11% of the world's annual output. Arcelor considered the bid as hostile and was mounting a defense against the takeover (Glader and Singer, 2006).

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

The new steel plant built on the site of Ugine & ALZ Carinox became operational in late 2005. The facility, with a capacity of 1 million metric tons per year (Mt/yr) of stainless steel, provided Ugine & ALZ with an integrated plant that formed the basis of the company's upstream production complex. The plant was built in 26 months and represented an investment of \$294 million; it replaced two smaller, nonintegrated plants (Arcelor S.A., 2005§).

Umicore stated that it would reduce zinc production by 130,000 metric tons per year to concentrate on value-added zinc products. This reduction involved the company's smelters at Belen in Belgium, and Auby and Calais in France. The company said the reorganization was necessary to safeguard the competitive strength of its operations. Apart from zinc metal, Umicore produced high-value-added zinc alloys and zinc-based chemicals and had a zinc recycling business (Mining Journal, 2005).

Cimenteries CBR S.A. (CBR) produced and marketed a wide range of cement for building, civil engineering, and public works. CBR's five production plants produced 3.2 Mt/yr of cement. As part of its plan to optimize production, CBR has invested a total of \$136 million in its Ghent and Lixhe plants. Also, CBR has reduced its energy consumption during the past few years. Since 1973, the amount of fossil fuel used to produce clinker has been cut by 50% by the increased use of renewable sources of energy and energy-efficient technological investments (Cimenteries CBR S.A., 2005§).

The diamond district of Antwerp, which comprised 4 exchanges and 1,500 diamond companies, was the most important diamond distribution center in the world. Exports of polished diamond from January thru November 2005 (the latest date for which data were available) were 8.8 million carats with a value of \$8.3 billion; imports of polished diamond for the same period were 8.8 million carats with a value of \$7.6 billion. The United States remained the most important export market for cut diamond. The diamond sector accounted for 8% of Belgium's total exports (Diamond High Council, 2005§).

Antwerp's diamond business, including all grades, had \$34 billion in trade, accounted for 7% of Belgium exports, and remained the dominant trading center for newly mined stones. The Diamond High Council was making efforts to strengthen ties with diamond-producing countries and large mining companies to ensure the flow of uncut diamond. Eight out of every ten rough diamonds in the world are handled in Antwerp (Resource Investor, 2005§).

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 located in Wallonia. Red, black, and gray are the principal color ranges of the marble, most of which was exported.

N.V. Nederlandse Gasunie and N.V. Nuon were to invest \$425 million in building a 180 million-cubic-meter salt-cavern natural gas storage facility at Zuidwending. Controlled salt mining will create four subterranean caverns, in which the natural gas will be stored. The caverns will lie at a depth of between 1,000

meters (m) and 1,500 m so that the gas will be stored more than 1,000 m deep. Natural gas has been stored in neighboring countries for many years (Platts, 2006§).

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 the leading port for steel products; the 2d ranked port in Europe after Rotterdam, the 4th fourth ranked port in the world, and the 10th ranked port in the world for container traffic (Antwerp Municipal Port Authority, 2006).

## Outlook

Belgium is expected to remain a significant mineral processor and major diamond trader in the world. It is also expected to continue to be a leading player in international and intra-European cargo handling.

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U.S. Commercial Service, 2005, Belgium, Country Commercial Guide, accessed March 5, 2006, at URL <http://www.buyusa.gov/Belgium/en/166.htm>.

## LUXEMBOURG

In 2005, Luxembourg's mineral industry comprised mainly minerals 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 products are listed in table 2.

Luxembourg has an area of 2,586 km<sup>2</sup> and had a population of 468,600. In 2005, the country's GDP based on purchasing power parity was \$30.7 billion, and the per capita income was \$66,820. The annual growth rate was 1.3% in real terms, the inflation rate was 2.4%, and the unemployment rate was 4.8% (International Monetary Fund, 2005§).

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 Dudelange (ARBED) dominated the country's mineral industry. The company was the major producer of crude steel, pig iron, and stainless steel, all of which were produced from imported material.

The Arcelor Group, which was the world's leading steel company in 2005 with a turnover of \$39.8 billion and the number one steel producer in Europe, inaugurated a new section mill—the Beval medium section mill at Arcelor's Esch-Belval site. This rolling mill represented an investment of more than \$207 million and was one of the largest investments carried out by Arcelor since its creation in 2002. The mill has a production capacity of 800,000 t/yr and would produce light and medium-

sized sections, U channels, and angle sections (Arcelor Group, 2005§).

## **Outlook**

Luxembourg is expected to continue to be a producer and exporter of steel. The industrial mineral production will be limited to domestic consumption.

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## **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 COMMODITIES<sup>1</sup>

(Metric tons unless otherwise specified)

Country and commodity	2001	2002	2003	2004	2005 <sup>e</sup>
BELGIUM <sup>2</sup>					
Metals:					
Aluminum, secondary including unspecified metals <sup>c</sup>	500	500	300	300	250
Arsenic, white <sup>c</sup>	1,500	1,500	1,200	1,200	1,000
Bismuth, metal <sup>c</sup>	700	700	600	500	500
Cadmium, primary	1,236	117 <sup>c</sup>	100	--	--
Cobalt, primary <sup>3</sup>	1,090 <sup>c</sup>	1,135	1,704	2,947 <sup>r</sup>	3,298 <sup>4</sup>
Copper:					
Blister, secondary	138,200	125,900	117,500	140,000	120,000
Unwrought, total, primary and secondary including alloys <sup>c</sup>	475,000	483,978 <sup>4</sup>	485,000	465,600 <sup>r</sup>	475,000
Refined, primary and secondary including alloys <sup>c</sup>	425,000	423,000	425,000	383,000 <sup>r</sup>	382,900 <sup>4</sup>
Iron and steel:					
Pig iron	7,732	8,053	8,000 <sup>c</sup>	8,000	8,000
Steel:					
Crude	10,763	11,495	11,128	11,698	10,422 <sup>4</sup>
Hot-rolled products	12,770 <sup>4</sup>	12,000	12,000	12,000	12,000
Lead, refined, secondary	100,000	88,000	65,000	62,000 <sup>r</sup>	63,400 <sup>4</sup>
Selenium <sup>c</sup>	200	200	200	200	200
Tin, metal, secondary including alloys	8,000 <sup>c</sup>	8,900 <sup>r</sup>	7,700 <sup>r</sup>	8,900 <sup>r</sup>	7,800 <sup>4</sup>
Zinc: <sup>c</sup>					
Slab:					
Primary	225,000	239,000	244,000 <sup>r</sup>	257,000 <sup>r</sup>	222,000
Secondary, possibly remelted zinc	67,000	70,000 <sup>r,4</sup>	42,000 <sup>r</sup>	46,000	40,000
Total	292,000	309,000 <sup>r</sup>	286,000 <sup>r</sup>	303,000 <sup>r</sup>	262,000
Powder	25,000	25,000	20,000	20,000 <sup>r</sup>	20,000
Industrial minerals:					
Barite <sup>c</sup>	30,000	30,000	30,000	30,000	30,000
Cement, hydraulic	8,064	8,152	7,469 <sup>r</sup>	7,379 <sup>r</sup>	7,400
Clay, kaolin <sup>c</sup>	387 <sup>r</sup>	411 <sup>r</sup>	429 <sup>r</sup>	459 <sup>r</sup>	460
Lime and dead-burned dolomite, quicklime <sup>c</sup>	1,800	1,800	1,800	1,800	1,800
Nitrogen, N content of ammonia	860 <sup>c</sup>	842	874	857	860
Sodium sulfate <sup>c</sup>	250	250	250	250	250
Stone, sand and gravel: <sup>c</sup>					
Calcareous:					
Alabaster	1,200	1,200	1,200	1,200	1,200
Dolomite	3,500	3,500	3,500	3,500	3,500
Limestone	30,000	30,000	30,000	30,000	30,000
Marble:					
In blocks	300	300	300	300	300
Crushed and other	100	100	100	100	100
Petit granite, Belgian bluestone:					
Quarried	1,200	1,200	1,200	1,200	1,200
Sawed	100,000	100,000	100,000	100,000	100,000
Worked	15,000	15,000	15,000	15,000	15,000
Crushed and other	800,000	800,000	800,000	800,000	800,000
Porphyry, all types	4,000	4,000	4,000	4,000	4,000
Quartz and quartzite	500,000	500,000	500,000	500,000	500,000
Sandstone:					
Rough stone including crushed	2,400	2,400	2,400	2,400	2,400
Paving	14,000	14,000	14,000	14,000	14,000
Sand and gravel:					
Sand:					
Construction	8,500	8,500	8,500	8,500	8,500
Foundry	500,000	500,000	500,000	500,000	500,000
Dredged	2,000	2,000	2,000	2,000	2,000
Glass	1,800	1,800	1,800	1,800	1,800
Other	2,800	2,800	2,800	2,800	2,800
Gravel, dredged	5,000	5,000	5,000	5,000	5,000

See footnotes at end of table.

TABLE 1--Continued  
 BELGIUM AND LUXEMBOURG: PRODUCTION OF MINERAL COMMODITIES<sup>1</sup>

(Metric tons unless otherwise specified)

Country and commodity	2001	2002	2003	2004	2005 <sup>e</sup>
<b>BELGIUM--Continued<sup>2</sup></b>					
<b>Industrial minerals--Continued:</b>					
<b>Sulfur:<sup>c</sup></b>					
<b>Byproducts:</b>					
Elemental	230,000	225,000	225,000	225,000	225,000
Other forms	180,000	175,000	175,000	175,000	175,000
Total	410,000	400,000	400,000	400,000	400,000
Sulfuric acid, byproduct of petroleum	2,000	2,000	2,000	2,000	2,000
	thousand metric tons				
<b>Mineral fuels and related materials:</b>					
Carbon black <sup>c</sup>	1,000	1,000	1,000	1,000	1,000
Coke, all types	3,222	2,967	3,200 <sup>e</sup>	3,200 <sup>e</sup>	3,200
Gas, manufactured	342,572	339,807	340,000 <sup>e</sup>	340,000 <sup>e</sup>	340,000
<b>Petroleum refinery products:</b>					
Liquefied petroleum gas	7,592 <sup>r</sup>	7,600 <sup>r</sup>	7,264 <sup>r</sup>	9,000 <sup>e</sup>	9,000
	thousand 42-gallon barrels				
Naphtha and white spirit <sup>c</sup>	16,000	16,000	16,000	16,000	16,000
Gasoline	46,428 <sup>r</sup>	48,801 <sup>r</sup>	49,567 <sup>r</sup>	50,000 <sup>e</sup>	50,000
Jet fuel	15,075 <sup>r</sup>	16,279 <sup>r</sup>	16,097 <sup>r</sup>	18,000 <sup>e</sup>	18,000
Distillate fuel oil	95,338 <sup>r</sup>	92,966 <sup>r</sup>	97,090 <sup>r</sup>	90,000 <sup>e</sup>	90,000
Refinery gas	10,475 <sup>r</sup>	10,439 <sup>r</sup>	10,877 <sup>r</sup>	3,500 <sup>e</sup>	3,500
Residual fuel oil	45,260 <sup>r</sup>	49,056 <sup>r</sup>	56,028 <sup>r</sup>	50,000 <sup>e</sup>	50,000
Bitumen <sup>c</sup>	5,000	5,000	5,000	5,000	5,000
Other	90,484 <sup>r</sup>	131,181 <sup>r</sup>	115,778 <sup>r</sup>	10,000 <sup>e</sup>	10,000
Refinery fuel and losses	10,475 <sup>r</sup>	10,439 <sup>r</sup>	10,877 <sup>r</sup>	10,000 <sup>e</sup>	10,000
Total <sup>c</sup>	342,000 <sup>r</sup>	388,000 <sup>r</sup>	385,000 <sup>r</sup>	262,000	262,000
<b>LUXEMBOURG<sup>5</sup></b>					
<b>Metals, steel:</b>					
Crude	2,725	2,736	2,675	2,684	2,194 <sup>4</sup>
	thousand metric tons				
Semimanufactures	2,974	2,800	2,800 <sup>e</sup>	2,800 <sup>e</sup>	2,600
	do.				
<b>Industrial minerals:</b>					
Cement, hydraulic <sup>c</sup>	750,000 <sup>4</sup>	700,000	700,000	700,000	700,000
Gypsum and anhydrite, crude <sup>c</sup>	400	400	400	400	400
<b>Phosphates, Thomas slag:<sup>c</sup></b>					
Gross weight	475,000	475,000	475,000	475,000	475,000
P <sub>2</sub> O <sub>5</sub> content	70,000	70,000	70,000	70,000	70,000

<sup>e</sup>Estimated; estimated data are rounded to no more than three significant digits; may not add to totals shown. <sup>r</sup>Revised. -- Zero.

<sup>1</sup>Table includes data available through March 2006.

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

<sup>3</sup>Production reported by N.V. Umicore S.A. includes production from China and South Africa.

<sup>4</sup>Reported figure.

<sup>5</sup>Construction 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 2005

(Thousand metric tons unless otherwise specified)

Country and commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity
<b>BELGIUM</b>				
Cadmium, metal	metric tons	N.V. Umicore S.A. (Sté. Générale de Belgique, 50.2%)	Balen	1,800
Cement		Major companies:	Plants:	8,400
Do.		Cimenteries CBR SA (Sté. Générale de Belgique)	Major plants at Lixhe, Mons/Obourg, Harmignies, Marchienne, and Ghent	3,200
Do. <sup>1</sup>		Ciments d'Obourg SA (Holcim Group)	Plants at Obourg and Thieu	2,800
Do.		Compagnie des Ciment Belge (Ciments Francais)	Plant at Gaurain-Ramecroix	2,400
Cobalt	metric tons	N.V. Umicore S.A. (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		N.V. Umicore S.A. (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	Total S.A.	Refinery at Antwerp	268,000
Do.	do.	SA Esso NV	do.	239,000
Do.	do.	Nynas Petroleum NV	do.	125,000
Do.	do.	Belgian Refining Corp.	do.	80,000
Do.	do.	Petroplus Refining Antwerp NV	do.	55,000
Salt		Zoutman NV	Plant at Roeselare	200
Sand, silica		SRC-Sibelco SA	Mines and plants at Lommel, Mol, and Maasmechelen	500
Steel		Companies:	Of which:	14,000
Do.		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		N.V. Umicore S.A. (Sté. Générale de Belgique, 50.2%)	Smelter and refinery at Balen	450
<b>LUXEMBOURG</b>				
Cement		SA des Ciments Luxembourgeois (Acieries Reunies de Burbach-Eich-Dudelange, 50.2%, and Sté. Générale de Belgique, 25%)	Plant at Esch-sur-Alzette	450
Do.		Intermoselle SARL (Acieries Reunies de Burbach-Eich Dudelange, 33%)	Plant at Rumelange	1,000
Steel		Arcelor Group	Plants at Differdange, Dudelange, Esch-Belval, Esch-Schifflange	5,320

<sup>1</sup>Includes the capacity of the company SA Ciments de Haccourt.