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F. C. Lopes, P. A. Dinis, L. V. Duarte, P. P. Cunha

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The Iberian industry of industrial minerals and rocks

A indústria ibérica de rochas e minerais Industriais

Alonso-Jiménez(1), M. Regueiro y González-Barros(2), M. Alvarez Areces (1) and D. Oliveira (3)

(1) Instituto Geológico y Minero de España CN IGME-CSIC, Madrid, Spain antonio.alonso@csic.es
(2) Consejo Superior de Investigaciones Científicas (CSIC) Madrid, Spain
(3) Laboratório Nacional de Energia e Geologia (LNEG) Lisboa, Portugal.

Summary: *Após mais de dois milênios de história da mineração, Espanha e Portugal produzem juntos cerca de mil milhões de toneladas de rochas e minerais industriais a cada ano. Em Espanha e Portugal, a indústria das rochas ornamentais e minerais industriais desenvolveu-se significativamente nos últimos anos. A demanda por materiais de construção e ornamentais aumentou e ambos os países emergiram como líderes mundiais na produção de mármore e outros produtos ornamentais. Apesar dos desafios ambientais e competitivos, a indústria continua lucrativa e em constante crescimento.*

Palavras-chave: *Indústria ornamental, Mármore, Espanha, Portugal, Minerais Industriais.*

Key words: Ornamental industry, Marble, Spain, Portugal, Industrial minerals.

The dimension stone and industrial minerals industry in Spain and Portugal fig. 1 has experienced steady growth in recent years. The demand for materials such as granite, marble, and natural stone has increased due to their popularity in building and home decoration.

In Spain, dimension stone production has mainly been concentrated in the regions of Galicia, Andalusia, and Catalonia. Quarrying and final product manufacturing takes place in these regions due to the availability of high-quality raw materials and the presence of appropriate infrastructure and technologies.

On the other hand, Portugal is known for its production of high-quality marble and is a significant exporter of dimensional stone globally. The marble industry in Portugal has developed in the regions of Estremadura and Alentejo, where there are numerous quarries and factories.

Despite the global pandemic and the uncertainty generated by it since its beginning, the natural stone sector has shown some improvement compared to 2020, increasing exports by 12% in 2021.

In the global context of recent decades, with increasingly globalized economic relations, the reduction in transport costs and the introduction of new information and communication technologies has meant an increase in trade for the natural stone sector due to external and entry opportunities in new markets, as well as increased competition in domestic markets.

Being the most important, foreign trade is not the only manifestation of internationalization since it covers any link between companies and foreign markets.

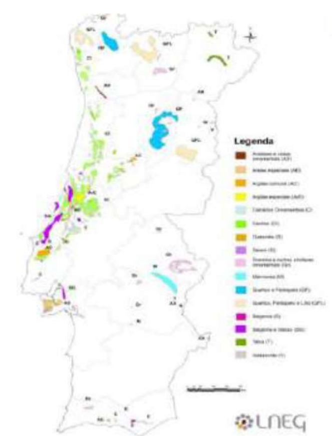

Fig.1 Mineral Resources Occurrences: Continental Portugal: - Non-Metallic resources - Ornamental Stones (LNEG, 2019)

In addition to traditional export, there are new international trends that should be reviewed.

Without being exhaustive, the following stand out:

Offshoring in all its variants. More and more Spanish and Portuguese companies are adding to the relocation of all or part of the production process, creating subsidiaries in other countries, etc. In many cases this expansion includes the exploitation of quarries beyond their borders.

Re-exports and re-imports to take advantage.

tariffs on certain areas are significant in the natural stone industry.

The foreign trade balance of natural stone in Spain is clearly favourable at €749 million. Until 2020 there had been a drop in both exports and imports, in the context of the global crisis.

exacerbated by the COVID19 pandemic. But this year 2022, it has improved by 9.48% compared to 2020. (CLUSTER_PIEDRA, 2022)

However, the dimension stone and industrial mineral industry in Spain and Portugal also faces challenges. Quarrying and mineral extraction can have negative impacts on the environment and local communities, leading to growing concern for sustainability and social responsibility.
Moreover, international competition is also a significant factor in the industry. The presence of dimension stone and industrial mineral producers in emerging countries such as China and India have created strong competition in the global market.
In conclusion, the dimensional stone and industrial mineral industry in Spain and Portugal is at a time of growth and challenges. Despite the challenges, both countries remain significant producers and exporters of these materials, and demand is expected to continue to increase in the future. Addressing environmental and competitive challenges will be necessary to ensure a sustainable future for the industry.
A short summary of the production quantities over the last 5 years:
In the fig.2 we can see the evolution of the production economic value in Spain in the last years

Fig. 2. Evolution of the value of production - ornamental rocks Source: Estadística Minera de España 2020

Spain:

Granite: 500,000 metric tons in 2018, 550,000 metric tons in 2019, 570,000 metric tons in 2020, 600,000 metric tons in 2021 and 630,000 metric tons in 2022.

Marble: 400,000 metric tons in 2018, 420,000 metric tons in 2019, 450,000 metric tons in 2020, 470,000 metric tons in 2021, and 500,000 metric tons in 2022.

Portugal:

Marble: 300,000 metric tons in 2018, 320,000 metric tons in 2019, 350,000 metric tons in 2020, 360,000 metric tons in 2021, and 380,000 metric tons in 2022.

Portuguese exports in 2021 reached a figure of 435 M€, according to the Portuguese organization (Instituto Nacional de Estadística , 2022). The main destinations were China (90 million €), France (80 million €), Spain (44 million€), Germany (30 million €) and USA (25 million €).
In the fig. 3 The weight of the industrial minerals and dimension stone industry is very important in the Portuguese economy and looks to be more important than the auto parts manufacturing industry.
In this paper, an attempt is made to collect the interrelation between the two countries, gathering data that shows that they are moving towards an Iberian market for industrial minerals and dimensional rocks, focused mainly on exports abroad.

Principais indústrias (VAB cf), 2020 Principales industrias manufactureras (VAB cf), 2020
Main manufacturing industries (GVA cf), 2020

Portugal		%
1º	Fabricação de produtos metálicos, exceto máquinas e equipamentos Fabricación de productos metálicos, excepto maquinaria y equipo Manufacture of fabricated metal products, except machinery and equipment	11,7
2º	Indústrias alimentares Industria de la alimentación Manufacture of food products	10,5
3º	Fabricação de outros produtos minerais não metálicos Fabricación de otros productos minerales no metálicos Manufacture of other non-metallic mineral products	7,5
4º	Fabricação de artigos de borracha e matérias plásticas Fabricación de productos de caucho y plástico Manufacture of rubber and plastic products	7,0
5º	Fabricação de veículos automóveis, reboques, semi-reboques e componentes para veículos automóveis Fabricación de vehículos de motor, remolques y semi-remolques Manufacture of motor vehicles, trailers and semi-trailers	7,0

Fig.3 Main manufacturing industries in Portugal (Instituto Nacional de Estadística , 2022)

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