



PROIZVODNJA NEMETALA I GRAĐEVNOG MATERIJALA

● PRIRODNI IZVORI

Industrija nemetala i građevnog materijala Hrvatske obuhvaća istraživanje, eksploataciju, oplemenjivanje, proizvodnju i preradu nemetalnih mineralnih sirovina. S obzirom na geološku građu i nastanak nemetalnih sirovina, Hrvatska ima široku osnovu nemetalnih mineralnih sirovina.

U eksploataciji su ležišta kvarcnog pijeska, bentonita, keramičkih i ciglarskih glina, gipsa, tufa, lapora, dolomita, vapnenca, eruptivnih materijala i šljunka za građevne materijale i arhitektonskoga kamena te se proizvodi morska sol. Poznata su, ali se ne iskorištavaju, ležišta kvarcita, barita, grafita te neka ležišta arhitektonskoga kamena.

● PROIZVODNJA

Nemetalni mineralni resursi Hrvatske omogućuju već tradicionalno intenzivnu eksploataciju i preradu nemetalnih sirovina u staklarskoj, keramičkoj, cementnoj, vatrostalnoj i opekarskoj industriji te arhitektonskoga kamena, posebno za potrebe graditeljstva. Industrija nemetala i građevnog materijala u ukupnoj industrijskoj proizvodnji Hrvatske 2007. godine sudjeluje s oko osam posto. Približno 80 posto proizvodnje te industrije čini reprodukcijски materijal za ostale industrijske grane, primjerice graditeljstvo, prehrambenu, kemijsku i metaloprerađivačku industriju, a 20 posto je roba široke potrošnje. Vađenjem ostalih

PRODUCTION OF NON-METALS AND BUILDING MATERIALS

● NATURAL RESOURCES

The Croatian non-metals and building materials industry comprises the exploration, extraction, refinement, manufacture and processing of non-metallic mineral raw materials. In terms of geological makeup and origin, Croatia has a wide range of non-metallic raw materials. The mined deposits of non-metallic raw material include silica sand, bentonite, ceramic and brick clay, gypsum, tuff, marl, dolomite, limestone, volcanic material and gravel used for building material and architectural stone. Sea salt is also produced. The known but unexploited deposits consist of quartzite, baryte, graphite and some architectural stone sites.

● PRODUCTION

Croatia's non-metallic mineral resources have traditionally allowed intensive extraction and processing of non-metallic raw materials in the production of glass, ceramics, cement, fire-resistant glass, bricks and architectural stone, especially for the needs of the construction and building industry. The non-metals and building materials industry accounts for approximately 8% of total industrial output in Croatia in 2007. Some 80% of this sector's output is production material for other branches of industry, e.g. construction, foodstuffs, chemicals and fabricated metal products, and the remaining 20% are consumer goods. Some 780 companies with approximately 18,000 employees are in

ruda i kamena te proizvodnjom drugih nemetalnih mineralnih proizvoda (prema podacima NKD-a i registracijom na trgovačkom sudu) bavi se oko 780 tvrtki s oko 18.000 zaposlenih.

the mining and quarrying of other ores, minerals and stone, as well as in the manufacture of other products based on non-metallic minerals (figures from the NCEA and Commercial Court's registers).

**PROIZVODNJA ODABRANIH INDUSTRIJSKIH PROIZVODA
INDUSTRIJE NEMETALA I GRAĐEVINSKOG MATERIJALA
MANUFACTURE OF SELECTED MANUFACTURING INDUSTRY PRODUCTS
NON-METALS AND BUILDING MATERIALS INDUSTRY**

	Jed. mj. Measur. Unit	2001.	2002.	2003.	2004.	2005.	2006.	2007.
Vađenje ostalih ruda i kamena / Other mining and quarrying								
Kamene i mramorne ploče Stone and Marble Slabs	m ²	1.044.944	1.127.948	1.093.573	1.219.843	1.053.165	1.271.436	1.521.022
Lom., tuc. i mlj. kamen i vapnenac Broken, Crushed and Ground Stone and Limestone	t tonnes	12.941.128	14.736.303	19.022.039	20.562.579	19.950.000	21.749.489	21.179.891
Kremeni pijesak Flint Sand	t tonnes	252.013	275.121	237.141	226.615	242.874	240.410	241.213
Morska sol Sea salt	t tonnes	32.737	36.885	31.281	29.923	33.856	30.389	32.456
Proizvodnja ostalih nemetalnih mineralnih proizvoda / Manufacture of other non-metallic mineral products								
Ravno staklo Flat glass	tis. m ² '000 m ²	305	390	495	976	994	943	992
Ambalažno staklo Container glass	t tonnes	140.570	148.612	171.030	197.781	215.000	216.451	223.355
Ostalo šuplje staklo Other hollow glass	t tonnes	1.631	1.711	1.466	1.439	1.602	1.757	2.101
Keramika za kućanstvo Ceramics for household goods	t tonnes	2.584	2.614	2.688	2.507	2.316	2.233	2.306
Keramika za građevinarstvo Porcelain for construction	t tonnes	53.946	60.723	62.774	63.221	70.674	78.551	103.884
Grafitne i amorfne elektrode Graphite and amorphous electrodes	t tonnes	25	21	16	18	20	-	-
Hidratizirano vapno Hydraulic lime	t tonnes	252.613	268.518	250.748	249.238	237.381	267.618	275.071
Cement Cement	t tonnes	3.246.120	3.377.849	3.654.076	3.811.116	3.580.000	3.622.036	3.627.000
Opeka Bricks	m ³	1.862.506	1.884.995	2.015.102	2.034.712	1.980.752	2.006.818	2.050.000
Crijep Tiles	tis. kom. '000 p/st	83.509	86.455	80.322	85.617	96.343	92.088.000	96.233.000
Azbestno-cementni proizvodi Asbestos cement products	t tonnes	21.664	25.944	23.712	17.300	15.787	7.699	-
Lake građevinske ploče Light building tiles	m ²	573.669	387.036	543.270	618.376	512.500	515.376	497.808
Elementi za zidanje (od cementa, šljunka, pijeska) Building blocks, bricks, panels	t tonnes	59.094	57.477	59.973	53.371	56.925	81.551	91.083
Stropne konstrukcije Ceiling components	t tonnes	271.172	354.518	320.450	360.257	351.276	395.518	368.076
Krovnja ljepenka, bitumen, papir i juta Roofing and facing products of bitumen	t tonnes	10.265	14.623	26.829	24.671	60.893	73.675	64.762

Izvor: DZS, obrada HGK

Source: CBS, processed by CCE

NEKI OSNOVNI POKAZATELJ POSLOVANJA INDUSTRIJE NEMETALA I GRAĐEVINSKOG MATERIJALA BASIC INDICATORS OF THE NON METALS AND BUILDING MATERIALS INDUSTRY

Ukupni prihod (u kunama) / Total Revenues (in HRK)							
	2001.	2002.	2003.	2004.	2005.	2006.	2007.
C14	1.065.344.160	1.052.071.733	1.467.721.246	1.462.647.145	1.602.221.430	1.963.800.962	2.420.272.690
D26	6.085.668.490	6.453.082.201	7.587.519.024	8.109.355.510	8.493.083.857	9.332.820.770	10.123.037.823
Ukupno Total	7.151.012.650	7.505.153.934	9.055.240.270	9.572.002.655	10.095.305.287	11.296.621.732	12.543.310.513
U USD In USD	857.538.391	953.398.619	1.350.721.997	1.587.133.585	1.696.689.964	1.934.684.317	2.340.169.871
Zaposleni / No. Employees							
	2001.	2002.	2003.	2004.	2005.	2006.	2007.
C14	2.392	2.422	2.763	3.016	3.088	3.158	3.417
D26	13.942	13.734	14.621	15.154	13.653	13.899	14.490
Ukupno Total No.	16.334	16.156	17.384	18.180	16.741	17.057	17.907

IZVOZ

Uspješno poslovanje industrije nemetala i građevnog materijala nije omogućila samo potrošnja na domaćem tržištu nego i izvoz na tržišta susjednih zemalja te širom svijeta.

Najvažnije grupe izvoznih proizvoda industrije nemetala i građevinskih materijala od 2001. do 2007. godine:

- staklarska industrija (ambalažno, lijevano, sigurnosno, laboratorijsko-farmaceutsko staklo)
- sve vrste cementa
- keramički proizvodi (keramičke pločice, sanitarije, porculan)
- arhitektonsko-građevni kamen
- mineralna vuna
- opekarski proizvodi (cigla i crijep)
- kameni agregati i betonski prefabrikati.

UVOZ

Uvoz robe industrije nemetala i građevnog materijala od 2001. do 2007. godine obilježava uvoz sirovina i gotovih proizvoda kakvi se u Hrvatskoj ne proizvode ili se nedovoljno proizvode: fosfata, feldspata, kaolina, specijalnoga kvarcnog pijeska, arhitektonskoga kamena eruptivnog podrijetla, morske i kamene soli, float-stakla, staklene vune, vatrootalnih materijala, ali i proizvoda keramičke industrije (pločice, sanitarije, porculan), opekarskih proizvoda (cigla i crijep), betonskih prefabrikata, bitumenskih proizvoda i staklarske industrije (ambalažno staklo i sigurnosno staklo, staklo za kućanstvo te farmaceutsku industriju).

EXPORTS

The successes in the non-metals and building materials industry has not only been the result of domestic consumption, but also the export of the manufacturing surplus primarily to neighbouring and international markets.

The most important groups of export products manufactured by the non-metals and building materials industry between 2001 and 2007 were the following:

- glass industry (container, cast, safety, laboratory and pharmaceutical glass);
- all types of cement;
- ceramic products (ceramic tiles, products for bathrooms and toilets, porcelain);
- architectural and building stone;
- mineral wool;
- brick products (bricks and roofing tiles);
- stone aggregates and prefabricated concrete components

IMPORTS

Products of the non-metal and building materials industry typically imported in the period 2001-2007 were those that are not produced in Croatia or are produced in inadequate amounts: phosphates, feldspar, kaolin, special silica sand, architectural stone of volcanic origin, sea and rock salt, float glass, glass wool, fire-resistant materials and also products of the ceramics industry (tiles, bathroom and toilet equipment, porcelain), brick products (bricks and roofing tiles), prefabricated concrete products, bitumen products and glass industry (container and safety glass, household glass and glass for the pharmaceutical industry).

UVOZ – IZVOZ PROIZVODA INDUSTRIJE NEMETALA I GRAĐEVNOG MATERIJALA 2001. - 2007. (000 USD) IMPORTS/EXPORTS OF THE NON-METAL AND BUILDING MATERIALS INDUSTRY 2001 - 2007 ('000 USD)

	2002.		2003.		2004.		2005.		2006.		2007.	
	UVOZ IMPORTS	IZVOZ EXPORTS	UVOZ IMPORTS	IZVOZ EXPORTS	UVOZ IMPORTS	IZVOZ EXPORTS	UVOZ IMPORTS	IZVOZ EXPORTS	UVOZ IMPORTS	IZVOZ EXPORTS	UVOZ IMPORTS	IZVOZ EXPORTS
Vađenje ostalih ruda i kamena Mining of other ores and stones	38.572	21.621	48.067	29.712	63.935	43.572	74.478	47.562	77.121	63.601	98.240	71.462
Proizvodnja ostalih nemetalnih min. proizvoda Production of other non-metal mineral products	258.551	203.186	333.444	244.957	381.512	278.861	398.314	334.641	479.144	374.015	577.610	455.403
Ukupno industrija nemetala i građ. materijala Non-metal and building industry material -total	297.123	224.807	381.511	274.669	445.447	322.433	472.792	382.203	556.265	437.616	675.750	526.865

Izvor podataka: Ministarstvo financija – prava carina

Source: Ministry of Finance – Customs Administration

Strukovno udruživanje industrije nemetala i građevnog materijala u HGK

Udruženje industrije nemetala i građevnog materijala pri HGK objedinjuje tvrtke iz djelatnosti istraživanja, eksploatacije, oplemenjivanja, proizvodnje i prerade nemetalnih sirovina.

Udruženje promiče, zastupa, usklađuje i štiti zajedničke interese članica pred državnim i drugim tijelima u zemlji i inozemstvu. Usklađuje međusobne interese članica na području proizvodnog, tehničko-tehnološkog razvoja, ekonomsko-financijskoga poslovanja te pravnih pitanja iz gospodarstva.

Zadaci i poslovi udruženja odvijaju se preko Vijeća

Udruženja i grupacije:

- Grupacija cementne industrije
- Grupacija staklarske industrije
- Grupacija keramičke industrije
- Grupacija ciglarske i crjeparske industrije
- Grupacija proizvodnje tehničkoga kamena
- Grupacija proizvodnje arhitektonskoga kamena
- Grupacija proizvodnje betona i betonskih prefabrikata
- Grupacija proizvodnje abrazivnih sredstava
- Grupacija proizvodnje vapna
- Grupacija ostale proizvodnje i prerade nemetalnih mineralnih sirovina.

Udruženjem industrije nemetala i građevinskih materijala rukovodi i zastupaju:

- Predsjednik udruženja: Dragutin Špiljak – Vetropack (Hum na Sutli)
- Dopredsjednik: Ljerka Cerc – Inker (Zaprešić)
Ivan Ergović – Nexe – grupa (Našice)
- Tajnik: Josip Miličić - HGK

Professional association of the non-metal and building materials industries within the CCE

The Non-metal and Building Materials Industry Association of the Croatian Chamber of Economy brings together companies whose primary business activities are the exploration, exploitation, refinement, manufacture and processing of non-metallic mineral raw materials.

The Association represents, coordinates and protects the interest of the members before government bodies and other bodies both at home and abroad. It coordinates the common interests of its members regarding production, technical and technological development and economic and financial dealings as well as the legal issues of economy.

The tasks and the activities of the Association are performed by the Council and through the following Groups:

- Cement Industry Group;
- Glass Industry Group;
- Ceramic Industry Group;
- Brick and Roofing Tiles Industry Group;
- Technical Stone Manufacturers Group;
- Architectural Stone Manufacturers Group;
- Concrete and Prefabricated Concrete Product Manufacturers Group;
- Abrasive Manufacturers Group;
- Lime Manufacturers Group;
- Other Non-metallic Mineral Raw Material Manufacturers Group.

The activities of the Association are managed and represented by:

- President of the Association: Dragutin Špiljak – Vetropack (Hum na Sutli)
- Vice President of the Association: Ljerka Cerc – Inker (Zaprešić), Ivan Ergović – Nexe – Group (Našice)
- Executive Secretary: Josip Miličić - CCE

DVADESET PET NAJVEĆIH PROIZVOĐAČA INDUSTRIJE NEMETALA I GRAĐEVINSKOG MATERIJALA
PREMA ZAVRŠNOM RAČUNU ZA 2007. (u 000 kn)

TOP 25 MANUFACTURERS OF THE NON-METAL AND BUILDING MATERIALS INDUSTRY BRANCH
ACCORDING TO 2007 FINANCIAL STATEMENTS (IN '000 HRK)

Red. br. Rank	TVRTKA COMPANY	GRAD SEAT	DJELATNOST ACTIVITY	Ukupan prihod Total Revenues	Broj zaposlenih No. of Employes
1	Dalmacijacement d.d. www.dalmacijacement.hr	Kaštel Sućurac	cement Cement Production	1.160.523	728
2	Vetropack Straža d.d. www.vetropack.com	Hum na Sutli	ambalažno staklo Container glass	713.302	650
3	Našicecement d.d. www.nasicecement.hr	Našice	cement Cement Production	531.204	402
4	Holcim (Hrvatska) d.o.o. www.holcim.hr	Koromačno	cement Cement Production	492.745	233
5	Samoborka d.d. www.samoborka.hr	Samobor	bet. pref. i žbuke Concrete Prefabricated Concrete Products and Mortar	449.367	363
6	Knauf d.o.o. www.knauf.hr	Kosovo (Knin)	proizvodi od gipsa Plaster products	275.605	135
7	KIO d.d. www.kio.hr	Orahovica	keramičke pločice Ceramics tiles	234.096	536
8	Tondach Hrvatska d.d. www.tondach.hr	Bedekovčina	crijep Roof tiles	210.245	284
9	Eko Međimurje d.d. www.eko.hr	Čakovec	opeka Bricks	205.104	515
10	Kamen d.d. www.kamen-pazin.hr	Pazin	arh. kamen Decorative Stone	201.400	365
11	Kamen Sirač d.d. www.kamen-sirac.hr	Sirač	vapno Lime	185.323	188
12	Vibrobeton d.d. www.vibrobeton.hr	Vinkovci	betonski prefabrikati Concrete pref. Products	142.876	317
13	IGM Dilj d.d. www.dilj.hr	Vinkovci	opeka i crijep Bricks and Roof tiles	140.253	374
14	Wienberger Ilovac d.d. www.wienberger.hr	Samobor	opeka Bricks	139.977	115
15	Inker d.d. www.inker.hr	Zaprešić	sanitarna keramika i porculan Sanitary Product and Porcelain	135.313	706
16	Opeka d.o.o. www.opeka.hr	Osijek	opeka Bricks	135.248	356
17	Roefix d.o.o. www.roefix.com	Donja Pušća	žbuke Mortar	128.298	51
18	Lipik glas d.o.o. www.lipikglas.hr	Lipik	tehničko i lijevano staklo techincal glass and cast-glass	123.763	300
19	W & P d.o.o. www.wpkamen.hr	Sirač	žbuke Mortar	120.881	47
20	IGM Ciglana CerjeTužmo	Cerje Nebojse	opeka i crijep Bricks and Roof tiles	109.474	80
21	LIGNUM d.o.o. www.lignum.hr	Zadar		99.122	39
22	Jadrnkamen d.d. www.jadrnkamen.hr	Pučišća	arh. kamen Dekorative stone	98.943	329
23	TBG beton d.o.o. www.haildebercement.com	Zagreb	betonski prefabrikati Concrete pref. Products	94.804	39
24	NEXE beton d.o.o.	Vinkovci	betonski prefabrikati Concrete pref. Products	92.241	90
25	OPECO d.o.o. www.opeco.hr	Virovitica	opeka Bricks	90.585	194



**HRVATSKA GOSPODARSKA KOMORA
SEKTOR ZA INDUSTRIJU**

Direktor:
Ruđer Friganović, dipl. ing.
Osoba za kontakt:
Josip Miličić, dipl. ing.

Draškovićeva 45
HR-10000 ZAGREB
Tel.: +385 (0)1 4606-701, 4606-705
Fax: +385 (0)1 4606-737
E-mail: industrija@hgk.hr

**CROATIAN CHAMBER OF ECONOMY
INDUSTRY AND TECHNOLOGY DEPARTMENT**

Managing Director:
Ruđer Friganović, B. Sc. E.E.
Contact Person:
Josip Miličić, B. Sc.

Draškovićeva 45
HR-10000 ZAGREB, CROATIA
Tel.: +385 (0)1 4606-701, 4606-705
Fax: +385 (0)1 4606-737
E-mail: industrija@hgk.hr

**HRVATSKA GOSPODARSKA KOMORA
SREDIŠNJICA**

Rooseveltov trg 2
p.p. 630
HR-10000 ZAGREB
Tel.: +385 (0)1 4561-555
Fax: +385 (0)1 4828-380
E-mail: hgk@hgk.hr
www.hgk.hr

**CROATIAN CHAMBER OF ECONOMY
HEADQUARTERS**

Rooseveltov trg 2
p.p. 630
HR-10000 ZAGREB, CROATIA
Tel.: +385 (0)1 4561-555
Fax: +385 (0)1 4828-380
E-mail: hgk@hgk.hr
www.hgk.hr