

Title:

Estonian Oil Shale Industry Growth 2007 – 2012: Ongoing Developments and Forecast

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Oil shale has been commercially used in Estonia for fuels and energy production since 1924. During the Soviet period all oil shale operations were managed by state owned enterprises and usage of the products were arranged by the Soviet system. Accordingly, there was no real open market business for the oil shale products from the Second World War until the nineties of last century.

Today, when Estonia is independent and a member of the European Union, oil shale enterprises are operating in a common open market business environment. While most of the mining and power generation are still operated by state-owned organizations, there are also successful and fast developing private oil shale operations, which include mining, production of liquid fuels and chemicals, heat and power generation.

During the last 5 years the private oil shale industry has made significant efforts improving technology and reducing environmental impact. Also – shale oils have strongly positioned on the market and shale chemicals are finding their way to the international chemicals market. Favorable fuel market conditions have supported R & D activities and investments, which are going mainly in two directions – expansion of shale oil production and product development.

In 2007 all three Estonian shale oil producers are dealing with expansion projects. There is one 500 tpd GALOTER retort in Start Up phase, a new modified 3000 tpd GALOTER retort under construction and 3 more in the design phase. A state-of-the-art oil shale- and spent shale-based cement plant should be constructed in 2008-2011 and a new green field oil factory with three more 3000tpd retorts and a power plant is scheduled to be constructed in 2011-2013. Accordingly, oil shale use in oil factories will increase from 3.3 million metric tons in 2007 to 6 million tons 2012.

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