



2019 Minerals Yearbook

AFGHANISTAN [ADVANCE RELEASE]

THE MINERAL INDUSTRY OF AFGHANISTAN

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In 2019, minerals mined in Afghanistan included chromite, coal, fluor spar, gypsum, lime, marble, natural gas, petroleum, precious and semiprecious gemstones, and salt. The mineral-processing sector produced cement and steel. Afghanistan also has deposits of bauxite, copper, iron, lithium (spodumene), and rare-earth minerals, which have not been developed (table 1; U.S. Geological Survey, 2014).

Minerals in the National Economy

The real gross domestic product (GDP) increased by 3.0% in 2019 compared with 2.7% in 2018; the nominal GDP was \$19.2 billion. The GDP growth was mainly attributed to growth in the agricultural sector; growth in the manufacturing and services sector was restricted by the uncertainty inherent in the peace negotiations and the presidential election. The country's foreign direct investment decreased by 67% to \$39 million in 2019 from \$119 million in 2018. The total value of all Afghanistan's commodity exports decreased to \$864 million in 2019 from \$875 million in 2018. The total value of commodity imports decreased to \$6.8 billion in 2019 from \$7.4 billion in 2018. In 2019, in terms of amount, 772,137 metric tons (t) of coal was exported compared with 1.12 million metric tons (Mt) in 2018. In terms of value, coal accounted for 8% of total commodity exports, and talc, 2%. The major mineral commodity imports were, in terms of amount, 4.5 Mt of coal, 77,900 barrels of crude petroleum, and 22,494 t of marble (National Statistics and Information Authority, 2018a, b; 2019a, b; Asian Development Bank, 2019, p. 184; United Nations Conference on Trade and Development, 2020, p. 240; World Bank, The, 2020).

Afghanistan's exports to the United States were valued at \$38.8 million in 2019 compared with \$28.6 million in 2018. Gemstones (other) accounted for about \$20.9 million; stone, sand, cement, and other construction materials, \$14,000; and gem diamond, \$13,000. In 2019, imports from the United States were valued at \$757.7 million compared with about \$1.23 billion in 2018. Excavating machinery accounted for \$2.48 million; iron and steel products (other), \$751,000; iron and steel mill products, \$607,000; petroleum products (other), \$508,000; drilling and oilfield equipment, \$365,000; nonferrous metals (other), \$143,000; coal and fuels, \$65,000; natural gas liquids, \$58,000; steelmaking material, \$29,000; and machinery for specialized mining, \$23,000 (U.S. Census Bureau, 2019a, b).

Government Policies and Programs

In September 2019, presidential elections were held in Afghanistan. The outcome of the votes had not been made final by the end of the year. In August 2019, peace talks began between the United States and nonofficial entities. The Government continued to work on amendments to the Mining Law of 2014 and the Mining Regulations (2009). The first drafts of the amended Mining Law of 2019 and Mining Regulations (2019)

were published on the website of the Ministry of Mines and Petroleum (MoMP). The objectives of the Mining Regulations (2019) are to promote (1) transparency in the mineral industry, (2) a healthy and safe environment for people engaged in mining activities, and (3) regulation of illegal and unlicensed mining activities. The objectives of the Mining Law of 2019 are to promote the development of the mineral industry, which would help improve the economic self-sustainability of Afghanistan; secure optimal revenue for the country from mining activities; ensure that mining is conducted in accordance with best practices for the society and country; increase domestic and international investment in the mineral industry in Afghanistan; facilitate local community participation in the mineral industry, including through the use of domestic and local goods and services; and promote peace, security, and stability, including by placing controls on the country's mineral wealth (BBC News, 2019; Ministry of Mines and Petroleum, 2019b, p. 1; 2019c, p. 1; Nickel, 2019; Qazi, 2019).

The MoMP was taking steps to develop the mineral industry of Afghanistan and attract domestic and foreign investment. The High Economic Council and the Cabinet approved small- and large-scale mining areas for tendering; these areas are for mining of metals and industrial minerals. For metals, the following mining areas were approved: the Balkhab area (for gold), Ghorian (iron ore), Kundalan (copper and gold), Sayadara (iron ore), Veka Dur (gold), and Zarkashan (copper and gold). For industrial minerals, the following mining areas were approved: Daykundi, Ghazni, Herat, Kabul, Kapisa, Kunar, Nangarhar, and Parwan Provinces (for marble); Farah and Herat Provinces (tourmaline and tin); Baghlan Province (clay, gypsum, and bauxite); Bamyan, Ghazni, Parwan, Helmand, and Wardak Provinces (travertine); Nangarhar Province (Achin magnesite and talc); Ghor Province (Karnak Khanjar mercury and Nalbandon lead-zinc); Panjshir Province (emerald and iron); and the northern part of Logar Province (Aynak copper) (Ministry of Mines and Petroleum, 2019a, p. 1–14; 2020, p. 9, 11, 12, 15, 27, 57, 71).

In 2017, the High Economic Council approved the draft of the Mining Sector Roadmap. The objectives of the Mining Sector Roadmap are to provide an overview of Afghanistan's natural resources, including metals (bauxite, chromite, copper, gold, iron, and other metals), industrial minerals (gemstones, rare earths, sand and gravel, sulfur, talc, and other minerals), and mineral fuels and related materials (crude petroleum and natural gas), and address challenges in the mining sector, including the legal framework, necessary reforms, and the creation of industries and markets (Ministry of Mines and Petroleum, 2019d, p. 5, 8–9, 31–33; Pajhwok Afghan News, 2019).

According to the MoMP, local warlords, insurgents, and local people continued to mine in the country illegally and to smuggle chromite, coal, marble, precious stones, talc, and semiprecious stones out of the country. In 2019, the MoMP established

the Mines Protection Committee (MPC), which includes the members of the Environment and Natural Resources Committee, the Ministry of Interior Affairs, the Ministry of Defense, the MoMP, the National Directorate of Security (NDS), the National Environmental Protection Agency, the National Security Council, and the Parliament (Wolesi Jirga). The responsibility of the MPC is to identify, evaluate, prevent, reduce, and block illegal mining activities and to collect information on illegal activities. The MPC identified a total of 236 illegal mines throughout Afghanistan, of which 93 mines were located in Kabul Province; 28, in Herat Province; 23 each, in Nangarhar and Paktiya Provinces; 15 each, in Kapisa and Panjshir Provinces; 14, in Laghman Province; 13, in Kunar Province; and 12, in Parwan Province (Barakzai, 2019; Ministry of Mines and Petroleum, 2019e, p. 1–3).

Production

Afghanistan's mineral production data were not readily available because the numerous artisanal and small- to medium-scale mining operations throughout Afghanistan were not well documented. According to the National Statistics and Information Authority, Afghanistan's production of crushed marble increased by 285% in 2019; fluorspar, by 33%; and bituminous coal, by 12%. Production of cement decreased by 73%; chromium, by 56%; rock salt, by 37%; and lime, by 27%. These and other data on mineral production are in table 1.

Structure of the Mineral Industry

Table 2 is a list of major mineral facilities operating in 2019.

Commodity Review

Metals

Copper and Gold.—As of 2019, the Mes Aynak copper project had not been developed. Metallurgical Corp. of China Ltd. (MCC) was still in discussions with the MoMP on amendments to the Aynak mining contract. The MCC completed and submitted a feasibility study report for the underground mining proposal for the project, which was required by the Government of Afghanistan. The MCC was awaiting the final decisions by the Government of Afghanistan on relic protection and the proposed mining project (Metallurgical Corporation of China Ltd., 2020, p. 31).

In 2018, the Government approved a contract with Silk Road Mining and Development Co. (SRMDC) for the Shaida porphyry copper prospect in Herat Province. In 2019, the SRMDC was granted exploration and mining licenses for the property. In October 2018, the Government awarded exploration contracts for the Badakhshan gold prospect and Balkhab copper prospect in northern Sar-e Pul Province to the United States-based company CENTAR Ltd., which was a joint venture of Afghan Gold and Mineral Co. (AGCM) and Turkish Afghan Mining Co. (TAMC). In 2019, the Government canceled both contracts because CENTAR had reportedly not fulfilled its requirements under the contracts (Business Insider, 2019; Leotaud, 2019; Silk Road Mining, 2020).

Industrial Minerals

Cement.—In 2019, the MoMP invested \$350 million and made progress on mineral industry projects, which included improvements to the Jabal-e-Seraj and Samangan cement plants worth \$170 million and \$136 million, respectively. The MoMP planned to build the new Jabal-e-Seraj cement plant in Afghanistan to reduce the country's dependence on cement imports from Iran and Pakistan. The MoMP was working in cooperation with the U.S. Agency for International Development (USAID), which provided technical advice to the MoMP on key areas of the project, including a review of the technical and financial bids (Arman, 2019).

The Orbit International FZE Consortium proposed to invest \$170 million to develop a 20-megawatt powerplant and cement production facility near the city of Jabal-e-Seraj in Parwan Province. The cement plant's capacity was expected to be 1.2 million metric tons per year of cement, which would supply nearly 20% of Afghanistan's annual cement consumption, create more than 500 new jobs, and generate approximately \$10 million in annual tax and royalty payments. The approval of the project was delayed owing to a lack of capability at the Ministry's Large-Scale Mining Directorate to develop discounted cash flow models. A USAID-funded advisor developed a discounted cash flow model, which helped to secure approval for the proposal. The MoMP and Orbit International were then able to proceed with contract negotiations (U.S. Agency for International Development, 2019).

In 2019, the MoMP canceled the contract for the Ghori cement plant, which was operated by Afghan Investment Co. The Ghori cement plant was to be placed under Government control (Cement News, 2019; Omid, 2019).

Outlook

The Government has intensified its efforts to develop mineral resources by implementing changes in the Mineral Law and mineral-related regulations, to improve and strengthen Government transparency and accountability, and to provide responsible security around mine sites through peace agreement talks. The Government is also actively working to attract foreign investment into the country's mineral industry. Foreign investment in infrastructure and transportation for mining is expected to be a key factor in the development of the mineral industry in the future as the Government continues to offer tenders or bids for development of metal and industrial mineral resources.

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TABLE 1
AFGHANISTAN: PRODUCTION OF MINERAL COMMODITIES¹

(Metric tons, gross weight, unless otherwise specified)

Commodity ²	2015	2016	2017	2018	2019	
METALS						
Chromium, mine, chromite	5,700 ^r	4,545	6,400 ^r	4,500 ^e	2,000 ^e	
Iron and steel:						
Raw steel, from scrap	2,826	24,000	33,000	33,000 ^e	33,000 ^e	
Products, cast iron	5,030	4,620	3,945	3,790	3,800 ^e	
INDUSTRIAL MINERALS						
Cement, hydraulic	thousand metric tons	70	101	180	110	30
Fluorspar		4,108	7,600 ^{r,e}	7,500 ^{r,e}	7,500 ^{r,e}	10,000 ^e
Gemstones:						
Precious ^e	kilograms	500	520	610	610 ^r	610
Semiprecious ^e	metric tons	5,000	5,000	4,500	4,500	4,000
Gypsum, mine		57,000 ^r	57,000 ^r	40,000	36,161 ^r	36,200 ^e
Lime		89,000	78,000	66,000	49,000	35,970
Nitrogen, ammonia, N content		44,000	48,000	48,000 ^e	48,000 ^e	48,000 ^e
Salt, rock salt		87,014	98,000	57,000	75,600	47,900
Sand and gravel, unspecified		832,000	3,070,000	1,580,000	956,000	865,800
Stone, crushed, marble		42,756	31,036	29,100	28,300	108,900
MINERAL FUELS AND RELATED MATERIALS						
Coal, bituminous		1,517,400	1,364,800	1,698,200	2,191,400	2,445,600
Natural gas:						
Gross volume	million cubic meters	142	146	165	156	153 ^e
Marketable	do.	128	131	148	140 ^e	137
Petroleum, condensate	thousand 42-gallon barrels	96	84	95 ^e	90 ^e	NA

^eEstimated. ^rRevised. do. Ditto. NA Not available.

¹Table includes data available through June 4, 2020. All data are reported unless otherwise noted. Estimated data are rounded to no more than three significant digits.

²In addition to the commodities listed, aluminum, barite, gold, lapis lazuli, and talc may have been produced, but available information was inadequate to make reliable estimates of output.

TABLE 2
AFGHANISTAN: STRUCTURE OF THE MINERAL INDUSTRY IN 2019

(Metric tons unless otherwise specified)

Commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity ^e
Cement	thousand metric tons	Ghori I (Government, 100%)	Pul-e-Khomri, Baghlan Province	144
Do.	do.	Jabal-e Saraj cement plant (Government, 100%)	Parwan Province ¹	37
Do.	do.	Pishgaman Magdeh Co.	Cement plant in Herat Province ²	700
Do.	do.	Samangan cement plant (Government, 100%)	Samangan Province ¹	160
Chromite		Hashemi Brothers	Mine at Dado Khil Deh Naw Area, Logar Province	NA
Coal		Afghan Investment Co.	Mine in Baghlan Province	NA
Do.		Arya Popal Co.	Maloma coal mine, Karkh District, Herat Province	NA
Do.		Ensaf Lal	Saighan District, Bamyan Province	NA
Do.		Khushak Brothers Co.	Dara-e-Suf Mine, Samangan Province	NA
Do.		Misaq Sharq Ltd.	Abkhorak Mine, Samangan Province	NA
Do.		North Coal Enterprise	Mine in Baghlan Province	NA
Do.		Khushak Brothers Co.	Sabzak Mine, Herat Province	NA
Fluorspar		Amania Mining Co.	Bakhud Mine, Kandahar Province	4,000
Gemstones:				
Precious:				
Emerald	kilograms	NA	Bakhi, Butak, Buzmal, Darun, Miken, and Khenj Mines, Panjshir Province	510
Ruby	do.	Partially under government control, partially under private control	Jegdalek Mine, Sorobi District, Kabul Province	100
Semiprecious:				
Lapis lazuli		Ljewardeen Mining Co.	Sar-e-Sang area, Kuran Wa Munjan District, Badakhshan Province	NA
Do.		NA	Jurm District, Badakhshan Province	NA
Do.		NA	Zebak District, Badakhshan Province	NA
Tourmaline		NA	Deo Darrah Mine, Kash District, Badakhshan Province	NA
Gypsum		Ahmad Sar Jangan Construction Co.	Mine in Nawar, Ghazni Province	10,000
Do.		Almas Ghaznawyan	do.	417
Do.		Emsatullah Asem	Mine in Daimiradad District, Maidan Wardak Province	10,000
Do.		United Engineers Co.	Mine in Ghazni Province	NA
Natural gas	million cubic meters	Afghan Gas Ltd. (Government, 100%)	Blocks in Sheberghan, Jowzjan Province	70
Do.	do.	do.	do.	14
Do.		Dragon Oil plc, 40%; Türkiye Petrolleri A.O., 40%; Ghazanfar Group, 20%	Sanduqli and Mazar-i-Sharif Blocks, Balkh Province	NA
Petroleum, condensate	thousand 42-gallon barrels	Ghazanfar Group	Ghazanfar oil refinery, Hairatan Town, Balkh Province	150,000
Salt		Khaje Akash Business Ltd.	Mine in Takhar Province	NA
Do.		Naseer Omid Salt Extraction Co.	Mine in Herat Province	NA
Do.		Qayyum Ghane Co.	do.	NA
Do.		Qarizada Rebsazi Co.	Mine in Andkhoy Town, Faryab Province	NA
Do.		Westco International FZE	Kalfagan Mine, Kalfagan area, Takhar Province	70,000
Sand and gravel, unspecified		Bakhtar Cristal	Dehdadi, Balkh Province	80,000
Do.		Kawoon Construction Co.	Khuaja Musafer Mine, Paghman, Kabul Province	160
Do.		Sehar Perez Co.	Mine in Qala Haider Khan, Kabul Province	96,000
Do.		Technologest Co.	Mine in Tanhi Gharo, Kabul Province	31,000
Do.		do.	do.	730
Do.		Estimad Qarabagh Co.	Estalif Mine, Kabul Province	40,000
Do.		Fordbamika	do.	48,000
Steel, raw, from scrap		Afghan Folad Steel Mill Corp. Ltd.	Plant in Herat Province	29,000
Do.		Maisam Steel Mill	Plant in Pul-e-Charkhi, Kabul Province	36,500
Do.		Sino-Afghan Steel Co. (Watan Group, 100%)	Plant in Kabul Province	NA

See footnotes at end of table.

TABLE 2—Continued
 AFGHANISTAN: STRUCTURE OF THE MINERAL INDUSTRY IN 2019

(Metric tons unless otherwise specified)

Commodity	Major operating companies and major equity owners	Location of main facilities	Annual capacity ^c
Stone, marble, crushed	Ahmad Fazil Stone Extraction Co.	Mine in Herat Province	NA
Do.	Adel Brothers Co.	Mine in Chesht Sharif District, Herat Province	NA
Do.	Afghan Marble Mining Co.	do.	NA
Do.	Baharart Marble Extraction and Processing Co.	Mine in Herat Province	NA
Do.	Rahmat Fazel Construction and Construction Material Production Co.	Mine in Maidan Wardak Province	NA
Do.	Gold Mining Co.	do.	NA
Do.	Green Construction Co.	do.	NA
Do.	Homebuiding Enterprise	Mine in Kabul Province	NA
Do.	Jamal Asia Marble Extraction and Processing Co.	Mine in Chesht Sharif District, Herat Province	NA
Do.	Mica Stone Processing Co.	do.	NA
Do.	Mining Investment Co.	Mine in Herat Province	NA
Do.	Murwarid Herat Co.	Mine in Chesht Sharif District, Herat Province	NA
Do.	Natural Rock Processing Co.	do.	NA
Do.	Naghsh Jahan Co.	do.	NA
Talc	Afghanistan Shirzad Co.	Mine in Shirzad District, Nangarhar Province	17,500
Do.	Bilal Sakhal Co.	Mine in Achin District, Nangarhar Province	50,000
Do.	Habib Shahab Co.	Talc processing facilities, Shirzad District, Nangarhar Province	50,000
Do.	Jalil Hasanzai Co.	Mine in Nangarhar Province	NA
Do.	Khaled Ayaaz Co.	Mine in Shirzad District, Nangarhar Province	70,000
Do.	Riahan Yunes Ahmadazi Ltd.	do.	163
Do.	Spinghar Talc Co	Mine in Nangarhar Province	NA
Do.	Shemshir Samir Co.	do.	NA

^cEstimated; estimated data are rounded to no more than three significant digits. Do., do. Ditto. NA Not available.

¹The plants were going through reconstruction in 2019.

²The plant was under tendering process since 2018. No further information was available.