



2019 Minerals Yearbook

KYRGYZSTAN [ADVANCE RELEASE]

THE MINERAL INDUSTRY OF KYRGYZSTAN

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Kyrgyzstan ranked sixth in the world in mercury production in 2019, accounting for 0.5% of total world production. Gold remained the primary mineral (in terms of value) mined in Kyrgyzstan. Other mineral commodities mined and produced in the country were clay, coal, copper, gypsum, lime, natural gas, crude petroleum, salt, sand and gravel, and silver (table 1; George, 2020; Klochko, 2020).

Minerals in the National Economy

Kyrgyzstan's real gross domestic product (GDP) increased by 4.5% in 2019 compared with an increase of 3.5% (revised) in 2018. The nominal GDP was \$8.50 billion (including production from the Kumtor gold mine) in 2019. According to the World Bank, the country's economy was vulnerable to external shocks because of its reliance on the output of the Kumtor gold mine, which accounted for 8% of the GDP. Industrial output increased in value by 6.9% in 2019 and contributed 17.9% to the GDP. Mineral industry output increased in value by 18.4%; manufacturing output, by 8.3%; and construction output, by 10.6%. The President of Kyrgyzstan indicated the necessity to amend the laws relevant to the mineral industry to ensure transparency, fairness, and clean competition; to improve the country's investment in mining; and to create favorable conditions for investors. He also requested an increase in the tax rates for the mineral industry, which would increase the contribution of the mineral industry to Government revenue (Kyrgyz Telegraph Agenttigi, 2019; International Monetary Fund, 2020, p. 132; National Statistical Committee of the Kyrgyz Republic, 2020b, p. 77, 82–83; World Bank, The, 2020).

The value of Kyrgyzstan's total exports was \$1.74 billion in 2019 compared with \$1.59 billion in 2018, and that of imports was \$4.48 billion in 2019 compared with \$4.80 billion (revised) in 2018. In 2019, the value of gold exports was \$730 million, which accounted for 42% of Kyrgyzstan's total exports; the value of exports of ores and concentrates of other precious metals was \$136 million, which accounted for 8% of the total exports; and the value of cement exports was \$28.7 million, which accounted for 2% of the total exports. The country's major export partners were (in order of the export value) the United Kingdom, which received 42% of Kyrgyzstan's exports; Kazakhstan, 17.6%; Russia, 13.5%; and Uzbekistan, 7.3%. In 2019, the value of cement imports was \$14.2 million; and that of bituminous coal imports, \$9.3 million. The country's major import partners were (in order of import value) China, which supplied 35.5% of Kyrgyzstan's imports; Russia, 27.8%; and Kazakhstan, 12.6% (National Statistical Committee of the Kyrgyz Republic, 2020b, p. 126–127).

Production

In 2019, rock salt production increased by 20.4%; crude petroleum, by 17.9%; and sand and gravel (industrial, silica),

by 17.2%. Production of mercury (metal) decreased by 25.0% (estimated); silver (mine output, Ag content), by 16.3% (estimated); and natural gas, by 10.6% (table 1). Data on mineral production are in table 1.

Structure of the Mineral Industry

As of 2019, about 2.5% of the industrial enterprises were owned by the Government; 5.0%, were owned by municipalities; and 92.5% were privately owned. Table 2 is a list of the major mineral industry facilities, their locations, and their annual capacities (National Statistical Committee of the Kyrgyz Republic, 2020a, p. 177).

Commodity Review

Metals

Antimony.—In 2019, the State Committee for Industry, Energy and Subsoil Use (SCIES) planned to resume production at the Kadamzhay complex, which was the sole antimony producer in Batken Oblast', by the end of 2019. As of the end of 2019, however, the Kadamzhay complex remained closed and did not produce antimony. Production of antimony at the complex had been halted since 2017 owing to the lack of raw materials and financial problems. Previously, raw materials were delivered to the Kadamzhay complex from the Novoangarskii processing plant in Russia and from Tajikistan (Manasova, 2015; Kostenko, 2017; Kant.kg, 2019).

Copper, Gold, and Silver.—In 2019, Centerra Gold Inc. of Canada remained the leading gold mining company operating in Kyrgyzstan. The Kumtor Mine produced 18,688 kilograms (kg) of gold in 2019 compared with 16,640 kg in 2018. As of December 31, 2019, the Kumtor Mine's total proven and probable reserves were estimated to be 43.3 million metric tons (Mt) of ore at a grade of 2.31 grams per metric ton (g/t) gold and containing 100,000 kg of gold (Centerra Gold Inc., 2019a, p. 4; 2019b).

Zijin Mining Group Co. Ltd. of China held 60% of the Taldybulak Levoberezhny gold mine (Taldybulak), which is located 120 kilometers (km) east of the Nation's capital, Bishkek, and 12 km south of Orlovka. The mine was operated by Altynken LLC, which was created in 2016 to oversee production at the mine. The mine started commercial production in July 2015 and produced 4,147 kg of gold in 2019. The reserves of the Taldybulak Mine were estimated to be 74,648 kg of gold (Dzyubenko, Olga, 2015; Zijin Mining Group Co. Ltd., 2020).

JSC Kyrgyzaltyn owned three gold mines—the Makmal, the Solton-Sary (Altynkor area), and the Terek-Sai Mines. In 2016, Kyrgyzaltyn (25%) and Eti Bakyr TerekSai (75%) of Turkey formed a joint venture that was expected to work on developing gold mines, including the TerekSai, the Terekkan, and the Pereval'noye Mines. As of 2019, the work on the

TerekSai Mine had stopped owing to disagreement and conflict with local residents (Kudryavtseva, 2017; Vasil'kova, 2017; Ukrainian Metal, The, 2018; Committee of the Jogorku Kenesh of the Kyrgyz Republic, 2019; Kabar, 2019).

In 2009, Zhong Ji Mining Co. of China (a subsidiary of China Gold Hong Kong Buchuk Mining Com. Ltd.) was granted an exploration license for the Buchuk area at Solton-Sary. The license was due to expire on February 6, 2020. In 2013, the company was granted a mining license for 10 years. In 2012, the company obtained a license to develop Solton-Sary Mine in the east of Kyrgyzstan; however, in 2019, the Committee of the Jogorku Kenesh suspended all operations of Zhong Ji Mining because of clashes between local residents and company employees (Interfax, 2019a, p. 7–8; Committee of the Jogorku Kenesh of the Kyrgyz Republic, 2019; Radio Free Europe/Radio Liberty, 2019).

As of 2016, reserves at the Makmal Mine were being depleted and the mine had raw material stocks for only 1.5 years. Kyrgyzaltyn was actively trying to attract investors for exploration to extend the life of the mine. In 2019, an agreement was signed between Kyrgyzaltyn and Manson Group LLC of China to create a joint venture in which Kyrgyzaltyn would have a 30% share, and the Manson Group, 70%. The Manson Group was expected to invest \$75 million and to make annual deductions of \$143,534 before commissioning of the gold recovery plant or its modernization. This investment would create 800 jobs for people at the plant and 315 for residents of the Toguz-Torous district (Kul'nazarov, 2016; Vechernii Bishkek, 2016; Kudryavtseva, 2017; Information Support Department, 2019).

The Bozymchak copper-gold mine is located in the Ala-Buka region, Jalal-Abads Province, and was operated by KAZ Minerals plc of Kazakhstan (KAZ Minerals) (formerly Kazakhmys Gold Kyrgyzstan LLC). As of December 31, 2019, the proved and probable reserves of the Bozymchak Mine were 11.7 Mt of ore grading 0.72% copper, 1.15 g/t gold, and 6.9 g/t silver. The total measured and indicated resources were estimated to be 13.6 Mt grading 0.78% copper, 1.30 g/t gold, and 7.9 g/t silver. In 2019, KAZ Minerals produced 7,500 t of copper concentrate (Cu content), 1,260 kg of gold, and 8,200 kg of silver at the Bozymchak Mine (table 1; KAZ Minerals plc, 2020, p. 182–183, 187–188).

In 2016, Chaarat Gold Holdings Ltd. of the United Kingdom was given a permit by the authorities of Kyrgyzstan to construct a heap-leaching complex at the Tulkubash gold field and to develop an underground mine at the Kyzyltash gold project at the Chaarat gold field. The designed capacity of the heap-leaching complex was expected to be 2,900 kilograms per year (kg/yr) of gold during a mine life of 5.3 years. The designed capacity of the underground mine at Kyzyltash was expected to be 9,300 kg/yr of gold. As of 2019, the total resources at the Tulkubash Field, including measured, indicated, and inferred, were estimated to be 24.3 Mt at a grade of 1.21 g/t gold and containing 29,000 kg of gold. As of 2019, the total resources at Kyzyltash, including measured and indicated, were estimated to be 39.5 Mt of ore at a grade of 3.70 g/t gold and containing 140,000 kg of gold (Chaarat Gold Holdings Ltd., 2019a, b; 2020, p. 1, 17).

In 2015, the Government awarded a 20-year license to Alliance Altyn LLC, which was a subsidiary of

Vostok-Geolodobycha Co. of Russia, to develop the Jerooy gold mine. The first production of gold at Jerooy was expected to start in March 2020 (AKIpress, 2017; Interfax, 2017, p. 8; Ukraine Metal, The, 2017; International Business Council, 2019).

Mercury.—In 2019, Kyrgyzstan produced an estimated 15,000 kg of mercury. The Khaydarkan mining and metallurgical complex was the sole producer of mercury in Kyrgyzstan. On May 13, 2019, the Kyrgyz Parliament announced that a draft law on adoption of the Minamata Convention would be put forward for public discussion in the near future. The Minamata Convention on Mercury is an international treaty that protects human health and the environment from anthropogenic emissions of mercury and its compounds, which can lead to poisoning. In joining the Minamata Convention, Kyrgyzstan would agree to stop manufacturing, exporting, and importing mercury-containing products, which would lead to closure of the Khaydarkan mining and metallurgical complex (Masalieva, 2019).

Mineral Fuels and Related Materials

Uranium.—Kyrgyzstan had not produced uranium since 2016. In December 2019, the Government signed a bill into law that banned exploration and mining of uranium and thorium deposits. In addition, the bill prohibits the import of uranium in any form and of raw material that contains uranium and thorium into the country. The bill was a result of protest by residents against the development of the Tash-Bulak uranium deposit in the Issyk-Kul region. The Government of Kyrgyzstan indicated that 20 licenses had been issued for the development of uranium deposits (Interfax, 2019b, p. 15; World Nuclear Association, 2020).

Outlook

In 2019, the Government of Kyrgyzstan continued to intensify its efforts to increase mineral production by holding mining tenders and attempting to attract foreign investors for its mining and manufacturing industries. The country was trying to grow its mineral industry by improving transparency in the process of issuing licenses for exploration, prospecting, development, and mining of its natural resources. The production of antimony and uranium may not resume in the near future. Kyrgyzstan's copper production is expected to increase in the near future. The production of gold at the heap-leaching complex at Tulkubash was delayed until 2022 as a result of the coronavirus disease 2019 (COVID-19) pandemic. Gold production in Kyrgyzstan is most likely to increase in the future, however, but this will depend on the foreign investments made into existing mines and the start of new operations that may result from current and future exploration projects.

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TABLE 1
KYRGYZSTAN: PRODUCTION OF MINERAL COMMODITIES¹

(Metric tons, gross weight, unless otherwise specified)

Commodity ²	2015	2016	2017	2018	2019
METALS					
Antimony:					
Mine, Sb content	650 ^e	1,030 ^e	750 ^e	370 ^e	--
Refinery, metal and compounds	--	40	--	--	--
Copper, mine:					
Ore:					
Gross weight	449,000	1,034,000	1,009,000	1,002,000	1,024,000
Cu content	4,400	9,100	9,000	8,600	8,400
Concentrates:					
Gross weight	13,000	33,900	33,900	33,100	31,200
Cu content	3,100	8,300	8,000	7,200 ^r	7,500
Gold:					
Mine, Au content kilograms	18,000 ^e	19,000 ^e	27,900	27,400	26,849
Refinery, bullion do.	389	1,045	1,365	1,219 ^r	1,320
Mercury, metal do.	45,500	20,000 ^e	20,000 ^e	20,000 ^e	15,000 ^e
Silver, mine, Ag content do.	9,890	18,410	17,097	16,000	13,400 ^e
INDUSTRIAL MINERALS					
Cement, hydraulic thousand metric tons	1,496 ^r	1,302 ^r	1,505 ^r	1,931 ^r	2,005
Clay, kaolin	1,332,600	1,332,600	1,322,600	1,400,000 ^e	1,400,000 ^e
Gypsum, mine	40,000	40,000 ^e	40,000 ^e	42,000 ^e	42,000 ^e
Lime	5,000	6,300	7,300 ^e	9,400 ^e	9,400 ^e
Salt, rock salt	1,600 ^e	1,600 ^e	1,600 ^e	4,655 ^r	5,604
Sand and gravel, industrial, silica	1,172,000	600,600	815,800	696,100 ^r	816,100
Stone, sand, and gravel, construction:					
Sand and gravel	1,313,600	1,123,400	1,454,700	1,351,400 ^r	1,327,400
Stone, size and shape unspecified:					
Granite, including sandstone	65,299	32,821	33,000 ^{r, e}	34,000 ^e	34,000 ^e
Marble, including limestone	97,000	97,000	97,000	102,000 ^e	102,000 ^e
MINERAL FUELS AND RELATED MATERIALS					
Coal:					
Bituminous	236,200	240,400	246,500	316,200 ^r	344,800
Lignite	1,702,500	1,611,300	1,628,900	2,057,500 ^r	2,187,900
Total	1,940,000	1,850,000	1,880,000	2,370,000 ^r	2,530,000
Natural gas thousand cubic meters	31,600	28,900	26,000	27,300	24,400
Petroleum, crude 42-gallon barrels	785,000	1,029,800	1,240,000	1,470,000	1,733,000
Uranium, mine, U content	1,500	--	--	--	--

^eEstimated. ^rRevised. do. Ditto. -- Zero.

¹Table includes data available through August 25, 2020. All data are reported unless otherwise noted. Totals and estimated data are rounded to no more than three significant digits; may not add to totals shown.

²In addition to the commodities listed, fluor spar, mined mercury, molybdenum, tin, and tungsten may have been produced, but available information was inadequate to make reliable estimates of output.

TABLE 2
KYRGYZSTAN: STRUCTURE OF THE MINERAL INDUSTRY IN 2019¹

(Thousand metric tons unless otherwise specified)

Commodity		Major operating companies, main facilities, or deposits	Location or deposit names	Annual capacity ^c
Antimony, metal	metric tons	ATF Invest (ATF Bank of Kazakhstan)	Kadamzhay metallurgical facility, Kadamzhayskiy region, Batken Province ²	105
Cement		China-Kyrgyz Co.	Aravan cement plant, Aravan District, Osh Province	200
Do.		Osoo Ak-Sai Cement	Osoo Ak-Sai cement plant, Kyzyl-Kiya, Batken Province	400
Do.		United Cement Group	LLC TechnoLin cement plant, Kant, Ysykaty District, Chuy Province	360
Do.		do.	OJSC Kant cement plant, Kant, Ysykaty District, Chuy Province	1,680
Do.		Verny Capital	South Kyrgyz Cement CJSC, Kyzyl-Kiya, Batken Province	1,000
Coal		Kyrgyzkomur, 51%, and Bishkek CHP and local society, 49%	Seven underground mines and five open pits among the following deposits: Almalyk, Dzhergalan, Kok-Yangak, Kyzyl-Kiya, Sulyukta, and Tashkumyr in southwestern, central, and northeastern parts of the country	2,200
Do.		NA	Kara-Kiche Mine, Naryn Province	NA
Copper:				
Ore, gross weight		KAZ Minerals plc	Bozymchak copper-gold deposit, Ala-Buka region, Jalal-Abad Province	1,100
Mine output, concentrate gross weight		do.	do.	34
Gold:				
Ore, Au content	kilograms	Altynken LLC (Zijin Mining Group Co. Ltd., 60%)	Taldybulak Levoberezhny ³	4,000
Do.		JSC Kyrgyzaltyn (Government, 100%), 30%, and Munson Group LLC, 70%	Makmal Mine, Toguz-Toro region	NA
Do.		Zhong Ji Mining Co.	Solton-Sary Mine, Naryn Province	NA
Do.		JSC Kyrgyzaltyn (Government, 100%), 25%, and Eti Bakyr Tereksai LLC, 75%	Tereksai Mine, Osh Province	NA
Do.		KAZ Minerals plc	Bozymchak gold deposit, Ala-Buka region, Jalal-Abad Province	NA
Do.	kilograms	Kumtor Gold Co. [Centerra Gold Inc., 67%, and JSC Kyrgyzaltyn (Government, 100%), 33%]	Kumtor deposit, Jeti-Oguz District, Issyk-Kul Province	28,000
Refinery	do.	JSC Kyrgyzaltyn (Government, 100%)	Makmalzoloto	NA
Gypsum		NA	Ak-Suu, Issyk-Kul	42
Mercury:				
Hg content of ore	metric tons	Khaydarkan mining and metallurgical complex	Aidarken mine, north of Aidarken town; Khaydarkan mine in southern Kyrgyzstan	3,300
Metal	do.	do.	Khaydarkan, Batken Province	50
Natural gas	million cubic meters	Kyrgyzjer Neftegaz Ltd. Liability Co. (China Huarong Energy Company Ltd., 60%)	Changyr-Tash, Chigirchik, Eastern Izbaskent, Kara-Agach, Mayluu-Suu IV, Pereval, Susahoye, and Togap-Beshkenskiye oilfields	30 ⁴

See footnotes at end of table.

TABLE 2—Continued
KYRGYZSTAN: STRUCTURE OF THE MINERAL INDUSTRY IN 2019¹

(Thousand metric tons unless otherwise specified)

Commodity		Major operating companies, main facilities, or deposits	Location or deposit names	Annual capacity ^e
Petroleum:				
Crude	thousand 42-gallon barrels	Kyrgyz Petroleum Co. (Kyrgyzneftgaz)	Jalal-Abad Province	1,100
Refinery products	do.	China Petrol Company Junda Ltd.	Junda, Kara-Balta	5,900 ⁵
Do.	do.	Tokmok Business Oil Refinery LLC (OJSC Xinjiang International Business Company, 100%)	Tokmok oil refinery	2,900
Do.	do.	Kant Refinery LLC	Kant oil refinery ⁶	2,200
Do.	do.	OJSC Kyrgyzneftegaz, 100%	Kyrgyz Petroluem	2,200
Do.	do.	do.	Jalal-Abad	500
Silver, mine output, Ag content	kilograms	JSC Kyrgyzaltyn (Government, 100%)	Makmal Mine, Toguz-Toro region	100
Do.	do.	KAZ Minerals plc	Bozymchak gold deposit, Ala-Buka region, Jalal-Abad Province	8,000
Do.	do.	Kumtor Gold Co. [Centerra Gold Inc., 67%, and JSC Kyrgyzaltyn (Government, 100%), 33%]	Kumtor deposit, Jeti-Oguz District, Issyk-Kul Province	6,000
Uranium, processed		Renova Group	Kara-Balta ore processing plant, Zarechnoye deposit, Chuy Province	4

^eEstimated. Do., do. Ditto. NA Not available.

¹Many location names have changed since the breakup of the Soviet Union. Many enterprises, however, are still named or commonly referred to based on the former location name, which accounts for discrepancies in the names of enterprises and that of locations.

²As of 2019, the plant had stopped production owing to the lack of material and financial problems.

³120 kilometers east of the capital Bishkek and 12 kilometers south of Orlovka.

⁴Capacity estimates are the total for all enterprises that produce that commodity.

⁵Stopped operation in 2019 owing to court decisions and nonpayment of taxes.

⁶As of 2015, the company filed for bankruptcy.