



2019 Minerals Yearbook

TAJIKISTAN [ADVANCE RELEASE]

THE MINERAL INDUSTRY OF TAJIKISTAN

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In 2019, minerals mined in Tajikistan included antimony, coal, gold, gypsum, lead, mercury, natural gas, petroleum, salt, sand and gravel, silver, and zinc. The mineral-processing industry produced aluminum and cement. In terms of world production in 2019, Tajikistan ranked third in antimony production and second in mercury production (estimated, excluding United States production) and accounted for 17% and 3% of world production, respectively (table 1; George, 2021; Klochko, 2021).

Minerals in the National Economy

In 2019, Tajikistan's real gross domestic product (GDP) increased by 7.5% compared with a 7.3% increase in 2018. The nominal GDP was \$8.1 billion. Industrial production, in terms of value, increased by 13.6% in 2019. Within the industrial sector, manufacturing production increased in value by 16.2%, and mining production, by 12.6%. In 2019, mining production, in nominal prices, amounted to \$504 million¹ and manufacturing production amounted to \$1.65 billion (Agency on Statistics Under the President of the Republic of Tajikistan, 2020, p. 161, 164–168; International Monetary Fund, 2020, p 132; World Bank, The, 2020a, b).

In 2019, in terms of value, Tajikistan's exports totaled \$1.17 billion, which was an increase of 9.4% from the total in 2018. The export value of precious and semiprecious stones and metals was \$226 million, which was an increase of 10.4% from that in 2018 and accounted for 19% of total exports. The export value of base metals was \$218 million, which was a decrease of 7.4% from that in 2018 and accounted for 19% of total exports. The export value of mineral products was \$459 million, which was a decrease of 15.6% from that in 2018. The country's main export partners were Kazakhstan, Switzerland, and Turkey (each of which received 20% of Tajikistan's exports), Uzbekistan (15%), and Afghanistan (8%) (Agency on Statistics Under the President of the Republic of Tajikistan, 2020, p. 262–265).

In 2019, in terms of value, Tajikistan's imports totaled \$3.3 billion, which was an increase of 6.3% compared with the total in 2018. The import value of precious and semiprecious stones and metals was \$4.3 million, which was a decrease of 18.4% compared with that in 2018. The import value of mineral products was \$628 million, which was an increase of 7.8% compared with that in 2018, and the import value of base metals was \$324 million, which was a decrease of 20.7%. The country's main import partners were Russia (which supplied 30% of Tajikistan's imports), Kazakhstan (22%), and China (18%) (Agency on Statistics Under the President of the Republic of Tajikistan, 2020, p. 262–265, 268).

Government Policies and Programs

In 2019, the Government of Tajikistan allowed private individuals to conduct artisanal mining of placer deposits of antimony, fluorite, gold, rare earths, silver, platinum, precious and semiprecious stones, tin, titanium, tungsten, and other mineral commodities. The individuals would have to obtain permitting documents from the Ministry of Finance to extract the minerals; the approved permitting documents would allow them to conduct mining in areas with undetermined reserves and resources. The Main Directorate of Geology under the Government of the Republic of Tajikistan would determine from which valleys, tributaries of rivers, and taluses of mountain slopes individuals would be able to extract the minerals (Central Asia.media, 2019).

In 2019, the Government began implementation of the National Development Strategy of the Republic of Tajikistan for 2018–30 (Strategy). In 2018, the National Development Council under the Office of the President of Tajikistan discussed the implementation of the Strategy, which is aimed at improving the country's socioeconomic resources, increasing industrial development, and determining the path for the future development of the country through integration of modern technologies at all levels of government agencies. The plan is intended to help in the development of modern mining and processing industries (Agency of Social Insurance and Pension, 2016, p. 5–96; Chamber of Commerce and Industry of the Republic of Tajikistan, 2017).

The Law on Subsoil of July 20, 1994 (No. 983), which was amended on December 28, 2013, is the law that outlines the legal provisions for the study, protection, and use of Tajikistan's subsoil in order to protect the interests of the country and its natural resources, ensure rational use and protection of the subsoil, protect the interests of subsoil users, create and ensure conditions for the development of all forms of economic activity related to the subsoil, and strengthen the rule of law with respect to subsoil use. The Law of the Republic of Tajikistan about Precious Metals and Gemstones of May 12, 2001 (No. 21), which was amended on November 27, 2014, is the law that regulates exploration and production of precious metals and gemstones. The Law on Production Sharing Agreements of March 5, 2007, No. 238, which was amended on August 1, 2012, is the law that regulates foreign investment in the exploration, transportation, processing, storage, use, and trade of minerals between the Government and investors when signing and terminating a production-sharing agreement (SojuzPravoInform LLC, 2020a–c).

Production

In 2019, production of antimony ore (Sb content) increased by 83% compared with production in 2018; gold ore (Au content), by 27%; and silver ore (Ag content), by 16%. Production of

¹Where necessary, values have been converted from Tajikistani somoni (TJS) to U.S. dollars (US\$) at the annual average exchange rate of TJS9.63=US\$1.00 for 2019.

natural gas decreased by 55%; lead ore (Pb content), by 50%; and zinc ore (Zn content), by 20%. Data on mineral production are in table 1.

Structure of the Mineral Industry

Table 2 is a list of major mineral industry facilities.

Commodity Review

Metals

Aluminum.—In 2019, state-owned Tajik Aluminum Co. (TALCO) was the sole producer of aluminum in Tajikistan; its production increased by 5% to 101,000 metric tons (t) of aluminum from 95,796 t in 2018. On June 15, 2019, an agreement was signed between the Government and China Machinery Engineering Corp. (CMEC) of China on the modernization of TALCO, which was projected to take 2 years to complete. According to the agreement, the modernization cost was estimated to be \$545 million, and would increase the Tursunzade smelter's production capacity to 300,000 metric tons per year (t/yr) of aluminum from 96,000 t/yr (tables 1, 2; Asia-Plus, 2019; Khiromon, 2019).

TALCO and Yunnan Construction and Investment Group of China signed an agreement on April 15 to build a new aluminum smelter in the western town of Tursunzade. The cost of construction of the proposed smelter was estimated to be between \$1.5 billion and \$1.6 billion, and construction was expected to be completed in 18 months. The smelter's total production capacity was planned to be 503,000 t/yr of aluminum (Avesta Information Agency, 2018a; Interfax, 2018; Fergana News, 2019).

Antimony and Gold.—In 2019, Tajikistan's production of gold increased to 8,100 kilograms (kg) from 6,400 kg in 2018. Gold producers in Tajikistan in 2019 included Aprelevka, Arteli Odina, Darvaz LLC, China Nonferrous Gold Ltd. (CNG) through LLC Pakrut, JV Darvaz, JV Zarafshon Gold Company LLC, OOO Takom Gold, Tilloi Tochik, and some artisanal mines (tables 1, 2; Avesta Information Agency, 2018b; Zijin Mining Group Co. Ltd., 2019, p. 14).

In 2019, China Nonferrous Gold Ltd. (CNG) of China operated the Pakrut gold mine through its wholly owned subsidiary LLC Pakrut and produced 731,600 t of gold ore (gross weight) and 17,966 t of gold concentrates (gross weight), yielding 1,168 kg of gold bullion. The construction work at the mine area was completed at the end of 2018 (China Nonferrous Gold Ltd., 2019, p. 6; Zijin Mining Group Co. Ltd., 2020).

On June 24, 2017, the President of Tajikistan issued CJSC TALCO Gold a permit to build mining and processing facilities. The construction was launched in 2018 and was expected to be completed by March 2020. The production capacity was expected to be 2,200 kilograms per year (kg/yr) of gold and 15,000 kg/yr of antimony. In April, the President signed a decree that would allow TALCO to transfer a 25-year license to TALCO Gold to develop mineral resources in the Konchoch area. The decree also allowed TALCO to transfer 50% of TALCO Gold shares to a foreign investor. Shareholders as of 2019 were TALCO and the joint-stock company Tibet Huayu Mining Co. Ltd. of China, each of which owned 50% of the

shares in TALCO. The Konchoch area contains three deposits: the Chul'boi gold-silver deposit, the Konchoch gold-silver-mercury-fluorite deposit, and the Shahkon gold-antimony-arsenic-fluorite deposit. The mineral reserves in the Konchoch deposit were estimated to be 265,000 to 268,000 t of antimony, 76,000 to 205,000 t of fluorite, 184 t to 1,197 t of mercury, 50,000 to 55,000 kg of gold, and 44,000 to 49,000 kg of silver (Chorshanbiyev, 2017; Interfax, 2018; Nadirov, 2019; Sputnik, 2019).

Industrial Minerals

Cement.—In 2019, Tajikistan's cement production increased by 9% to about 4.2 million metric tons (Mt) from about 3.8 Mt in 2018. The Ministry of Industry and New Technologies announced that Chzhungtsai Mohir Cement Co. was planning to build a new cement plant with a production capacity of 600,000 t/yr of cement, although no exact date for construction was specified. The budget for construction was estimated to be \$30 million. In 2019, Tajikistan's cement exports increased by about 7% to 1.5 Mt from 1.4 Mt in 2018. Uzbekistan received 890,000 t of Tajikistan's cement exports; Afghanistan, 580,000 t; and Kyrgyzstan, 80,000 t (Avesta Information Agency, 2020; Global Cement Staff, 2019, 2020).

Outlook

Tajikistan continues to rely heavily on foreign investment and loans for infrastructure development and mineral enterprises. In 2019, foreign companies (mainly from China) continued to be engaged in production of aluminum, gold, lead, and zinc in the country, and they are expected to continue to increase current production levels and to invest in new production projects for these mineral commodities in coming years. Tajikistan might increase aluminum, antimony, and gold production with the completion of a new aluminum smelter in the western town of Tursunzoda and new mining and processing facilities in the Konchoch area. The production of cement in Tajikistan likely will continue to increase owing to continued infrastructure development in the country and the region.

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TABLE 1
TAJKISTAN: PRODUCTION OF MINERAL COMMODITIES¹

(Metric tons, gross weight, unless otherwise specified)

Commodity ²	2015	2016	2017	2018	2019	
METALS						
Aluminum, metal, primary	140,000	129,000	103,147 ^r	95,796	101,000	
Antimony, mine, ore:						
Gross weight	29,036	60,000	58,870	64,280	118,000 ^c	
Sb content	7,000 ^c	14,000 ^c	13,960	15,240	27,950	
Gold, mine, ore, Au content	kilograms	4,200	5,000	5,500	6,400	8,100
Lead, mine, concentrate:						
Gross weight	59,295	84,749	114,000 ^r	99,000 ^r	49,000	
Pb content	36,000	51,000	68,900 ^r	59,300 ^r	29,500	
Mercury, ore, Hg content ^c	30	30	100	100	100	
Silver, mine, ore, Ag content	kilograms	4,000 ^c	3,000	4,300	6,300 ^c	7,300
Zinc, mine, concentrate:						
Gross weight	100,000 ^c	145,000 ^c	183,714	166,461	133,000	
Zn content	50,000	72,000	91,000	83,000	66,000	
INDUSTRIAL MINERALS						
Cement, hydraulic	thousand metric tons	1,418	1,361	3,117	3,844	4,202
Gypsum, mine		8,500	9,000	8,648	9,639	10,000 ^c
Salt		35,704	35,516	23,676	36,964	35,323
Sand and gravel, construction		666,000 ^c	730,700	1,670,000 ^c	3,410,000 ^c	3,400,000 ^c
MINERAL FUELS AND RELATED MATERIALS						
Coal:						
Bituminous		985,019	1,311,161	1,700,000	1,838,065 ^r	1,963,827
Lignite		56,200	50,414	68,000	68,990 ^r	63,963
Natural gas	thousand cubic meters	4,102	2,900	2,522	1,623	730
Petroleum, crude	42-gallon barrels	181,000 ^r	183,000 ^r	171,000 ^r	175,000 ^r	175,000

^cEstimated. ^rRevised.

¹Table includes data available through August 6, 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, clay, dolomite, fluorspar, limestone, marble, and refined products may have been produced, but available information was inadequate to make reliable estimates of output.

TABLE 2
TAJIKISTAN: STRUCTURE OF THE MINERAL INDUSTRY IN 2019¹

(Thousand metric tons unless otherwise specified)

Commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity ^c
Aluminum		Tajik Aluminum Co. (TALCO) (Government, 100%)	Tursunzade smelter, 60 kilometers west of Dushanbe	300
Antimony:				
Ore, gross weight		Anzob mining-beneficiation complex (Comsup Commodities Inc., 100%)	Dzhizhirkrut Mine, Sughd Province	64
Sb content of ore		Isfara hydrometallurgical plant (Government, 100%)	Isfara city, Sughd Province	15
Cement		NA	Chjuntsay-Taboshar cement	600
Do.		Chzhungtsai Mohir Cement Co. and Government	Plant at Yovon District, Khatlon Province	1,200
Do.		Tajik Ghayur Co. and Huaxin Central Asia Investment	Ghayur-Sughd plant at Babojon, Ghafurov District, Sughd Province	1,000
Do.		Huaxin Gayur Cement Co. Ltd., 75%, and Gayur LLC, 25%	Plant at Yovon, Yovon District, Khatlon Province	1,200
Do.		JSC Tajikcement Ltd.	Plant at Dushanbe	1,100
Do.		LLC Tojikiston	Plant at Kharangon village, Varzob District	70
Do.		NA	Isfara cement, Isfara District, Sughd Province	1,000
Do.		NA	Sarabansky cement	70
Do.		JV Tajikistan-China Co.	Taj-China cement plant, Vahdat District	1,200
Clay, loam		SP Anzob	Varzobskoye Ushchel'ye deposit	NA
Coal		Isfara hydrometallurgical plant (Government, 100%)	Isfara city, Sughd Province	300
Do.		Kaisun Energy Group Ltd.	Fan-Yaghnob Mine, Pyandzh region	50
Do.		OJSC Angisht	Surhab region	32
Do.		do.	Brown coal deposit, Surhab region	23
Do.		SP Anzob	do.	NA
Fluorspar, concentrate		Takob mining-beneficiation complex	Takob and Krasnye Kholmy deposits	60
Gold:				
Ore, Au content	kilograms	Aprelevka joint venture (Government, 51%, and Central Asia Minerals and Resources through subsidiary Gulf International Minerals Ltd., 49%)	Aprelevka deposit	600
Do.		Arteli Odina	Shungov Khovalin, Khatlon Province	NA
Do.	kilograms	JV Darvaz (Government, 51%, and Gold and Mineral Excavation Co., 49%)	Yak-Suyskoye deposit, Khatlon Province	400
Do.	do.	JV Zarafshon Gold Co. LLC [Zijin Mining Group Co. Ltd. (ZGC), 70%, and Government of Tajikistan, 30%]	Tilloi Tojik, Yakhsou deposit, Khatlon Province	NA
Do.	do.	LLC Pakrut [China Nonferrous Gold Ltd. (CNG), 100%]	Pakrut Gold Project, southern portion of the Tien Shan Fold Belt	700
Do.	do.	JV Zarafshon Gold Co. LLC [Zijin Mining Group Co. Ltd. (ZGC), 70%, and Government of Tajikistan, 30%]	Jilau and Taror Mines, Zarafshon valley, Sughd region	6,000
Do.		OOO Takom Gold	NA	NA
Ore processing		Aprelevka joint venture (Government, 51%, and Central Asia Minerals and Resources through subsidiary Gulf International Minerals Ltd., 49%)	Kansayskaya factory	NA
Do.		Vostokredmet refinery	Qizfaquz	NA
Lead-zinc		Adrasman mining-beneficiation complex (Government, 100%)	Adrasman, Sughd region	NA
Do.		Kansayskoye mining complex	Karamazor region	NA
Do.		Tibet Summit Industry Co.	Altyn-Topkan	NA
Do.		Tajik-China Mining Co. Ltd.	Zarnisor Shimoli, Northern Altyn-Topkan and Pay Buloq	NA
Mercury, Hg content of ore	metric tons	Anzob mining-beneficiation complex (Comsup Commodities Inc., 100%)	Jijikrutskoye deposit	100

See footnotes at the end of table

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

(Thousand metric tons unless otherwise specified)

Commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity ^c
Petroleum:				
Crude	thousand 42-gallon barrels	Beshtentyakskoye, Kichik-Belskoye, Shaambary, and Uzunkhorskoye deposits	Southern Tajik depression	250
Refined	do.	OJSC Naftason	Kanibadam city, Sughd region	500
Do.	do.	NA	Turshzoda town, Shahrinav District	460
Salt		NA	Ashtskiy plant, Kamyshkurganskoye deposit	NA
Do.		NA	Khoja-Sartez, Samanchi, and Tanabchi deposits	NA
Do.		NA	Voseyskiy plant, Khodzha-Muminskoye deposit	NA
Sand and gravel		Anvar LLC	NA	97
Silver, mine output, Ag content		Adrasman mining-beneficiation complex (Government, 100%)	Adrasman, Sughd region	NA
Do.		Aprelevka joint venture (Government, 51%, and Central Asia Minerals and Resources through	Aprelevka deposit	NA
Do.		Kytco BV	Akjilga, Gorno Badakhshan Autonomous Region	NA
Do.		Nukrafom Co. (Silverhill Resources Ltd.)	Kanjol ore deposit, Sughd region, Ghafurov District	NA
Do.	kilograms	JV Zarafshon Gold Co. LLC [Zijin Mining Group Co. Ltd. (ZGC), 70%, and Government of Tajikistan, 30%]	Jilau and Taror Mines, Zarafshon valley, Sughd region	6,800
Stone:				
Limestone		JSC Tajik cement	Kharangonskoye deposit	NA
Marble		Dal'yan Bolo deposit	Ganchin region	NA
Do.		Dashtak deposit	Darvaz region	NA
Do.		Jilikul deposit	Pendzhikent region	NA

^cEstimated; estimated data are rounded to no more than three significant digits. 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 locations.