



2020–2021 Minerals Yearbook

SYRIA [ADVANCE RELEASE]

THE MINERAL INDUSTRY OF SYRIA

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Note: In this chapter, information for 2020 is followed by information for 2021.

The mineral industry in Syria was adversely affected by the ongoing armed and political conflict in the country, which began in 2011 and continued throughout 2020. The Government maintained control of the southern and western parts of the country. The Syrian Democratic Forces (SDF) controlled most of the country located north of the Euphrates River. The National Liberation Front and troops from Turkey controlled Idlib Province and some towns and crossings along the Syria-Turkey border. Mining in Syria had been limited to mining of industrial minerals and mineral fuels; no metals had been mined in the country for centuries. In 2020, Syria produced ammonia, cement, gypsum, iron and steel, marble, natural gas, crude petroleum, phosphate rock, pumice, salt, and urea. Data on mineral production are provided in table 1 (Noack and Steckelberg, 2019).

According to S&P Global Market Intelligence LLC data, the nominal gross domestic product (GDP) of Syria was \$32.0 billion in 2020 and real GDP decreased by 10.5% compared with an increase of 4.8% in 2019. The economy continued to be negatively affected by the military and political conflict in the country as well as the coronavirus disease (COVID-19) pandemic. Consumer prices increased by 114%, and the unemployment rate increased to 59% in 2020 from 50% in 2019 (U.S. Central Intelligence Agency, 2021; S&P Global Market Intelligence LLC, 2022).

In 2020, Syria remained subject to many sanctions imposed by the United States and other countries from 2004 to 2015. The Syria Accountability Act of 2004 prohibited the export of most United States manufactured goods to Syria and the USA PATRIOT Act placed specific sanctions against the Commercial Bank of Syria in 2006. Some sanctions were contained in Executive Orders from the President of the United States concerning Syria, which were issued between 2004 and 2012. The Government and individual citizens remained subject to sanctions imposed by the United States and the European Union in 2015. In 2020, several additional sanctions, including the Caesar Syria Civilian Protection Act of 2019 (Caesar Act), were imposed by the United States and other countries. The Caesar Act and Executive Order 13894 warned foreign businesses from entering into business agreements with the Syrian Government or enriching it (U.S. Department of State, 2020, 2021; U.S. Department of the Treasury, 2021).

Government Policies and Programs

Law No. 26 of 2009 grants the state ownership of all surface and subsurface mineral resources within the country's borders and territorial waters. Law No. 91 of January 24, 2010, gives the General Establishment of Geology and Mineral Resources (GEGMR) the responsibility for all mining and quarrying activities in the country. Except for phosphate rock production,

which was carried out by the General Company for Phosphate and Mines (GECOPHAM), the GEGMR carried out virtually all mining activities in the country, either directly or through private contractors. Such activities included exploration, production, field and laboratory analyses, and geologic and geophysical studies. The General Petroleum Corp. (GPC) of the Ministry of Petroleum and Mineral Resources (MOMR), which was created by law No. 15 of 2009, was responsible for the country's hydrocarbon sector. The GPC's affiliates included Syrian Gas Co. (SGC), Syrian Petroleum Co. (SPC), and Syrian Company for Oil Transport (SCOT) (General Establishment of Geology and Mineral Resources, 2009; General Petroleum Corp., 2020; General Company for Phosphate and Mines, 2021; Ministry of Petroleum and Mineral Resources, 2021).

Production

Production of crude petroleum (including condensate) and natural gas liquids in Syria increased by 36% and 25%, respectively, in 2020 compared with that in 2019. Production of dry and gross natural gas decreased by 18% and 11%, respectively (table 1).

Structure of the Mineral Industry

In 2020, the Government was the only shareholder in the hydrocarbon facilities in areas under Government control through the GPC and its affiliates. The SDF controlled oilfields and some natural gas facilities in northeastern Syria. The Ministry of Industry was responsible for most cement and steel industries in the country through several state-owned enterprises, including General Organization for Cement and Building Materials, General Fertilizers Co. (GFC), and General Company for Iron and Steel Products. The privately operated domestic companies Al Badia Cement J.S.C. and Hmisho Steel S.A. produced cement and iron and steel, respectively. Small-scale private companies quarried industrial minerals that were used as building materials, such as basalt, clays, dolomite, iron oxides, limestone, and marble. Table 2 is a list of major mineral industries facilities.

Commodity Review

Industrial Minerals

Phosphate Rock.—Phosphate rock production in Syria was estimated to be 350,000 metric tons per year (t/yr) between 2018 and 2020. GECOPHAM mined phosphate rock at the Khunayfis, the Al Sharqiyah A, and the Al Sharqiyah B Mines, which had production capacities of 1.1 million metric tons per year (Mt/yr), 800,000 t/yr, and 700,000 t/yr, respectively. The mines are located in Palmyra in eastern Syria (tables, 1, 2; General Company for Phosphate and Mines, 2021).

In 2020, phosphate rock exports increased to more than 400,000 metric tons (t) from about 350,000 t in 2019. The destinations for the exported phosphate rock included Serbia and Ukraine; shipments to these countries went through the Port of Tartus on the Mediterranean Sea after being transferred by rail from the mines (International Fertilizer Association, 2021, p. 17).

The Government planned to increase phosphate rock output to 6 Mt/yr in the short term and to 10 Mt/yr in the long term by upgrading the railroad shipping capacity between the mines and the export terminal at the Port of Tartus. In the past 3 years, the Government signed three agreements with companies from Iran, Russia, and Serbia to mine phosphate rock in Syria. The first agreement was signed in 2017 with the Government of Iran to mine phosphate rock from the Al Sharqiyah deposit for 50 years. However, there was no verifiable information on the status of the Iran-based mining companies' activities in Syria by yearend 2020. The second agreement was between the Government and OAO Stroytransgaz of Russia, which was approved by the Parliament and included the creation of a joint venture of OAO Stroytransgaz and GECOPHAM to mine phosphate rock at the Al Sharqiyah A and Al Sharqiyah B deposits. The targeted capacity of this joint venture is 2.2 Mt/yr of phosphate rock. By yearend 2020, no progress had been reported on the operations of the joint venture. In 2020, the Government signed a third agreement with Womco Associate Doo of Serbia to produce 500,000 t/yr of phosphate rock at the Khunayfis deposit. The country's actual phosphate-processing capacity in 2020 remained at 111,000 t/yr for phosphoric acid and 174,000 t/yr for triple superphosphate (General Establishment of Geology and Mineral Resources, 2018, 2021; Cornish and others, 2019; Rostom, 2020).

Mineral Fuels

Natural Gas and Petroleum.—Crude petroleum and condensate production in Syria increased to 34,000 barrels per day (bbl/d) in 2020 from 25,000 bbl/d in 2019. Crude petroleum production in the past 5 years represented only a small fraction of the country's production in 2011, which was 353,000 bbl/d. Dry natural gas output decreased to 27 billion cubic meters in 2020 from 3.3 billion cubic meters in 2019 and 8.0 billion cubic meters in 2010. Gross natural gas production decreased to 4.0 billion cubic meters in 2020 from 4.5 billion cubic meters in 2019. The decrease in natural gas production was attributed to military attacks on natural gas treatment plants and the Government losing control of most oilfields in northeastern Syria to Islamic State of Iraq and Syria (ISIS) in 2014. Most of the lost fields were captured by the SDF in 2017 and were held under its control. Crude petroleum from oilfields in areas under the Government's control was delivered by pipeline to the state-owned Baniyas and Homs refineries, which produced 45.6 million barrels (Mbb) of refined products using both domestic and imported crude petroleum (mainly from Iran) to meet domestic demand. Under an agreement between the Government and the SDF, some of the crude petroleum and natural gas produced in SDF-controlled areas was transferred to refineries and natural gas processing plants in Government-controlled areas in return for electricity and fuel (tables 1, 2; Al Araby Al Jadeed, 2019; Makieh and Francis, 2019; BP p.l.c., 2022, p. 15, 18, 29; Organization of Arab Petroleum Exporting Countries, 2023, p. 31).

The proved natural gas and petroleum reserves in Syria were 300 billion cubic meters and 2.5 billion barrels, respectively, in 2020. The Government signed two agreements with Mercury LLC and Velada LLC (both of Russia) in 2019 to explore and develop an oilfield in northeastern Syria and a gasfield north of Damascus (Shurmina and Lyrchikova, 2015; Makieh and Francis, 2019; BP p.l.c., 2021, p. 16, 34).

MINERAL INDUSTRY HIGHLIGHTS IN 2021

The real GDP of Syria decreased by 2.9% in 2021. The nominal GDP was \$24.9 billion, and the unemployment rate increased to 60% in 2021 (S&P Global Market Intelligence LLC, 2022).

According to the MOMR, phosphate rock production in Syria increased by 250% to 350,000 t in terms of phosphorus pentoxide content and by 214% to 1.1 million metric tons (Mt) in terms of gross weight in 2021 compared with 2020 estimates. Phosphoric acid production was estimated to have increased by 25% in 2021, and salt, by 13%. The MOMR also reported production of 4.5 billion cubic meters of natural gas (gross), 31.4 Mbb) of crude petroleum and condensate, and 45.6 Mbb) of refined petroleum products, including 18.1 Mbb) of residual fuel oil, 10.5 Mbb) of distillate fuel oil, 8.1 Mbb) of gasoline, and 8.9 Mbb) of other products. Crude petroleum production in 2021 represented an increase of 153% compared with that of 2020, and most of the output came from the SDF-controlled areas. The Baniyas and Homs refineries were the only two refineries in operation in the Government-controlled areas; other minor refineries operated in northern Syria in the SDF-controlled area. The Baniyas and Homs refineries refined 5.8 Mbb) of crude petroleum produced in Syria in 2021; the remaining crude petroleum supplied to the refineries was imported, mainly from Iran (table 2; Attaqa, 2022).

In March 2021, the Government signed an agreement with Capital Ltd. of Russia to carry out natural gas and petroleum exploration in Block No. 1, which is located in the Mediterranean Sea in Syria's territorial waters off the coast of Tartus Province. In July 2021, SPC completed the rehabilitation of the Sharifa 6 natural gas well in central Syria (Sahiounie, 2021; Syrian Arab News Agency, 2021c).

Despite the reported increase of phosphate rock production in 2021, there was a shortage in the supply of fertilizers to farmers in the country, which contributed to the country's food crisis that year. The Government had to import fertilizers to meet the demand by farmers even after the resumption of production at the fertilizer plants operated by GFC and OAO Stroytransgaz in 2020. Production at the plants was stopped in 2015 owing to a lack of natural gas, phosphate rock, electricity, and spare parts (Enab Baladi, 2019a, b; Syrian Arab News Agency, 2021a, b).

Cement production in Syria was estimated to have increased to 2.5 Mt in 2021 from 2.4 Mt in 2020. However, the level of cement production remained under 3 Mt/yr during the past 5 years, which represented less than one-third of the 10 Mt/yr produced in the country before the beginning of the military and political conflict in 2011. In 2021, the Supreme Court of France was investigating the role that Switzerland-based LafargeHolcim Ltd., which changed its name to Holcim Ltd. in April 2021, may have played in supporting ISIS by way of

third-party payment of \$15 million to protect the company's cement plant at Jalabiya in Aleppo Province in 2013 and 2014. The cement plant was destroyed in 2019 (table 1; Aljazeera, 2021; International Cement Review, 2021, p. 314–15).

Outlook

The GDP of Syria was projected to decrease by 0.9% in 2022 and increase by 1.9% in 2023. With the decrease in the frequency of military operations in many parts of the country, mineral production noticeably increased in 2021 compared with that in the previous 4 years, especially in the hydrocarbon sector. Phosphate rock mining is expected to increase modestly but to remain at a reduced rate relative to capacity owing to the lack of investment needed to upgrade mining operations and transportation. Production of cement and iron and steel in the short term is likely to remain at much lower levels than that in 2011 owing to weak domestic demand and severe shortages in the supply of electricity, mineral fuels, and natural gas to the industrial and residential sectors (Calamur, 2019; S&P Global Market Intelligence LLC, 2022).

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TABLE 1
SYRIA: PRODUCTION OF MINERAL COMMODITIES¹

(Thousand metric tons, gross weight, unless otherwise specified)

Commodity ²	2017	2018	2019	2020	2021
METALS					
Iron and steel, raw steel ^c	5	5	40 ^r	40	40
INDUSTRIAL MINERALS					
Cement, hydraulic	2,120	2,150	2,200	2,400 ^e	2,500 ^e
Gypsum, mine ^e	150	150	150	150	150
Nitrogen, N content: ^e					
Ammonia	20	20 ^r	30 ^r	30	30
Urea	20	20 ^r	20 ^r	20	30
Phosphate:					
Phosphate rock:					
Gross weight	30 ^{r,e}	350 ^{r,e}	350 ^{r,e}	350 ^e	1,100
P ₂ O ₅ content	10 ^{r,e}	100 ^{r,e}	100 ^{r,e}	100 ^e	350
Products, phosphoric acid ^e	--	30 ^r	40 ^r	40	50
Pumice and related minerals, volcanic tuff ^e	200	200	200	200	200
Salt	25 ^e	25 ^e	100 ^{r,e}	100 ^e	113
MINERAL FUELS AND RELATED MATERIALS					
Natural gas:					
Dry basis	million cubic meters	3,500 ^r	3,500 ^r	3,300 ^r	2,700
Gross ^c	do.	5,000 ^r	5,000 ^r	4,500 ^r	4,500
Petroleum:					
Crude, including condensate	thousand 42-gallon barrels	6,205 ^r	5,840 ^r	9,125 ^r	12,405
Natural gas liquids	do.	2,920	2,920	2,920	3,650
Refinery products	do.	40,700	40,700	40,700	45,600

^cEstimated. ^rRevised. do. Ditto. -- Zero.

¹Table includes data available through July 6, 2022. 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, clay, dolomite, iron oxide, marble, natural asphalt, sand and gravel, sulfur, and stone may have been produced, but available information was inadequate to make reliable estimates of output.

TABLE 2
SYRIA: STRUCTURE OF THE MINERAL INDUSTRY IN 2021

(Thousand metric tons unless otherwise specified)

Commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity
Asphalt, natural crude		General Establishment of Geology and Mineral Resources (GEGMR) (Government, 100%)	Mines at Al Bishri, Dayr az Zawr, and Kafriyah, Latakia ¹	100
Cement, hydraulic		Adra Cement and Building Materials Co. (Altoun Group) ²	Plant at Adra, Rif Dimashq	1,000
Do.		Al Badia Cement J.S.C. (Al Muhaidib Holding Co., 33.9%; Syrinvest Holding B.V., 26%; public stockholders, 21.5%; Al Zaim Holding Co., 7.4%; Ibrahim Sheikh Deeb, 6.2%; Al Fozan Holding Co., 5%)	Plant at Abu ash Shamat	1,600
Do.		Al-Hasakeh Cement LLC (Guris Holdings, 100%)	Clinker mill at Yaroubiyeh, Al-Hasakah	700
Do.		Al-Shahaba Cement and Building Materials Co. ²	Plant ¹ at Sheikh Said, Aleppo	740
Do.		do.	Plant at Maslamieh, Aleppo	220
Do.		Arabian Cement Co.	Plant at Sheikh Said, Aleppo	876
Do.		Guris Raqqa Cement Co. (Guris Holdings, 100%)	Clinker mill ¹ at Ar Raqqah	300
Do.		Lafarge Cement Syria (Holcim Ltd., 98.67%, and Government, 1.33%)	Plant at Jalabiya, ³ Aleppo	3,000
Do.		Military Housing Cement Group (Government, 100%)	Plant at Maslamieh, Aleppo	336
Do.		Rastan Cement and Building Materials Co. ²	Plant at Rastan	1,131
Do.		Tartus Company for Manufacturing of Cement and Building Materials (Pharaon Group) ²	Plant at Tartus	1,800
Do.		The Syrian Company for Cement and Building Materials ²	Plant at Kafer Buhm, Hamah	1,500
Gypsum		General Establishment of Geology and Mineral Resources (GEGMR) (Government, 100%)	Mines at Ar Raqqah, ¹ Jayrud, and Latakia	573
Natural gas	million cubic meters	General Petroleum Corp. (GPC) (Government, 100%)	Ash Shaer ¹ and Cherrif gasfields	2,500
Do.	do.	Syrian Democratic Forces (SDF)	Processing plant at Dayr az Zawr	4,750
Do.	do.	do.	Processing plant at Jebissa	1,060
Do.	do.	do.	Processing plant at Suwaydiyeh	240
Do.	do.	do.	Abu Rabah, Abu Al Dhuhr, Al -Fayed north, Al-Rasm, Qumqum, and Bilas gasfields	1,825
Do.	do.	do.	Processing plant ¹ at Omar field	2,400
Do.	do.	Syrian Gas Co. (Government, 100%)	Arak gasfield, Palmyra	13,770
Do.	do.	do.	Dubayat gasfield, Palmyra	14,872
Do.	do.	do.	Processing plant at Palmyra	2,200
Nitrogen:				
Ammonia ⁴		OAQ Stroytransgaz, 65%, and General Fertilizers Co. (GFC), 35%	Plant at Homs	300
Calcium nitrate		do.	do.	100
Urea		do.	do.	330
Petroleum:				
Crude	thousand 42-gallon barrels	General Petroleum Corp. (GPC) (Government, 100%)	Al Mahr, Ash Shaer, Jazl, Johar, and Thayyam Fields	6,000
Do.	do.	Syrian Democratic Forces (SDF)	Al Izba, Al Kishima, al-Mazraa, Attala North Jafra, Al Ward, Galban, Jarnof-Saban, Karatchok, Khurbet East Maleh-Azraq, Omar, Oudeh, Qahar, Rumailan, Sijan, Suwaydiyeh, Tabiyeh, and Tanak oilfields	26,000
Refined	do.	Banias Refinery Co. (Government, 100%) and Distribution of Petroleum Products (GCRDPP) (Government, 100%)	Refinery at Banias	48,545
Do.	do.	Homs Refinery Co. (Government, 100%)	Refinery at Homs	43,800

See footnotes at end of table.

TABLE 2—Continued
 SYRIA: STRUCTURE OF THE MINERAL INDUSTRY IN 2021

(Thousand metric tons unless otherwise specified)

Commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity
Petroleum:—Continued				
Refined—Continued	thousand 42-gallon barrels	Small-scale operators	Makeshift refineries in Dayr az Zawr Province	NA
Phosphates:				
Phosphate rock		General Company for Phosphate and Mines (GECOPHAM) (Government, 100%)	Mines at Al Sharqiyah A and B, and Khunayfis, Palmyra	2,600
Do.		Joint venture of General Establishment of Geology and Mineral Resources (GEGMR) (Government, 100%), and OAO Stroytransgaz	Mines at Al Sharqiyah A and B	2,200
Products:				
Fertilizers		OAO Stroytransgaz, 65%, and General Fertilizers Co. (GFC), 35%	Plant at Homs	450
Phosphoric acid		do.	do.	110
Pumice and related materials, volcanic tuff		General Establishment of Geology and Mineral Resources (GEGMR) (Government, 100%)	Quarries at Daraa, As Suwayda, Al Hasakah, and Ar Raqqa	1,000
Salt		do.	Jebseh and Palmyra brines ¹	120
Do.		do.	Tabni Mine, ¹ Dayr az Zawr	100
Steel:				
Raw		General Company for Iron and Steel Products (Government, 100%)	Plant at Hamah	70
Rolled		Al Wahib Group	Plant at Tartus	100
Do.		Arabian Steel Co. (ASCO)	Plant at Jableh	300
Do.		General Company for Iron and Steel Products (Hadeed Hama) (Government, 100%)	Plant at Hamah	78
Do.		Hmisho Steel S.A.	Plant at Latakia	500
Do.		International Company for Steel Rolling	Plant at Hessya ¹	300
Do.		Joudco Steel Ltd.	do.	150
Do.		Middle East Steel Industries	Plant at Yabroud ¹	140
Do.		Orient Co.	Plant at Aleppo ¹	NA
Do.		Syria Steel and Iron Co. (SALB)	Plant at Adra	NA
Stone, dimension, marble		General Establishment of Geology and Mineral Resources (GEGMR) (Government, 100%)	Quarries at Zobar, Latakia, and Sabboura	800
Do.		Small-scale miners	Quarries at Rheibah, Rif Dimashq	NA
Sulfur		Homs Refinery Co. (Government, 100%)	Plant at Homs	40
Do.		do.	Processing plant at Suwaydiyah	NA
Do.		Syrian Petroleum Co. (Government, 100%)	Processing plant at Jebissa	NA
Sulfuric acid		Joint venture of OAO Stroytransgaz, 65%, and General Fertilizers Co. (GFC), 35%	Plant at Homs	NA

Do., do. Ditto. NA Not available.

¹Production curtailed since 2014.

²Subsidiary of the General Organization of Cement and Building Materials (GOCBM), which was 100% Government owned.

³Plant was completely destroyed in 2019.

⁴Expressed in nitrogen equivalent.