



2022 Minerals Yearbook

KYRGYZSTAN [ADVANCE RELEASE]

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World rankings for mineral production, shares of world production, and reserves presented in this chapter are derived from the referenced sources. Production data in this chapter may differ from data in other sources because of differences in the date of reporting.

THE MINERAL INDUSTRY OF KYRGYZSTAN

By Karine M. Renaud

Kyrgyzstan ranked fifth in the world in mercury production in 2022, accounting for 0.5% of total world production. Gold remained the primary mineral mined (in terms of value) in Kyrgyzstan. Other mineral commodities mined and produced in the country were cement, clay, coal, copper, gypsum, lime, mercury, natural gas, crude petroleum, salt, silica, sand and gravel, silver, and stone (granite and marble) (table 1; Sheaffer, 2024).

Minerals in the National Economy

Kyrgyzstan's real gross domestic product (GDP) increased by 7.0% in 2022 compared with an increase of 3.7% (revised) in 2021 owing to an increase in gold production; the country's economy was not greatly affected by the Russia-Ukraine conflict. The nominal GDP was \$10.73 billion¹ in 2022. Industrial output increased in value by 11.4% in 2022 and contributed 46% to the GDP; mineral industry output increased in value by 8.2% and contributed 5.1% to the GDP; and manufacturing output decreased in value by 16.4% and contributed 35.97% to the GDP (Asian Development Bank, 2023, p. 75; International Monetary Fund, 2023, p. 147; National Statistical Committee of the Kyrgyz Republic, 2023a, p. 79, 87–88).

Government Policies and Programs

Kyrgyzstan was a founding member of the Commonwealth of Independent States (CIS). In August 2015, Kyrgyzstan joined the Eurasian Economic Union (EAEU), which made free trade between Kyrgyzstan and the other EAEU members possible and encouraged new investments in the development of infrastructure projects in Kyrgyzstan, including those in the energy and transportation sectors (Ereport.ru, 2014; Commonwealth of Independent States, 2023; Eurasian Economic Commission, undated).

In 2022, the Russian-Kyrgyz Development Fund (RKDF) was expected to allocate \$90 million for new projects. The RKDF, which was established in 2014, was a \$1 billion lending program geared toward the development of infrastructure, small- and medium-sized businesses (including businesses in the manufacturing, metallurgical, and mining industries), trade, and transportation in Kyrgyzstan (Holzhacker and Skakova, 2019, p. 16; Russian-Kyrgyz Development Fund, 2021, p. 5; Interfax, 2022a).

In 2021, the President signed the Mining Code, which was focused on reforming the mineral industry to protect national interests, improve the productivity of the mineral industry, increase the transparency of legal regulations, ensure the safety of the population and of the environment, create a favorable

investment climate, and expand opportunities for the economic growth of Kyrgyzstan. In addition, mineral production was to be conducted exclusively by a national mining company that had 100% Government involvement in the authorized capital. Companies that already had a license to develop minerals at the time of the adoption of the new Mining Code would be allowed to continue to operate (Interfax, 2021, p. 29; Ministry of Justice of the Kyrgyz Republic, 2021).

In 2022, the President signed a decree to temporarily ban, for an initial period of 6 months, the export of scrap and waste of ferrous metals and ingots of ferrous metals for remelting (charge ingots) [as classified under code 7204 of the Customs Commodity Nomenclature of Foreign Economic Activity (TN VED) of the EAEU] starting in December 2022. The ban was put in place to prevent shortages of scrap and waste and ingots needed by local facilities. The processing of Kyrgyzstan's scrap and waste of ferrous metals and of ingots of ferrous metals for remelting (charge ingots) was expected to be done only in Kyrgyzstan. The ban was expected to be renewed every 6 months, starting on June 1, 2023 (President of the Kyrgyz Republic, 2023b; Yermolenko, 2024).

In 2022, the President signed a decree to temporarily ban, for a period of 6 months, the export of gold ore and gold concentrate; the ban was expected to go into effect on May 1, 2023. The Government owned the JSC Kara-Balta Mining Plant, which was the only entity that had a right to mine and process gold-bearing ore and gold-bearing concentrate in Kyrgyzstan (President of the Kyrgyz Republic, 2023c).

Production

In 2022, production of natural gas increased by 35%, and that of lignite and silica sand, by 25% each. Marble production decreased by 34%; gypsum, by 20%; and refined gold, by 18%. Data on mineral production are in table 1.

Structure of the Mineral Industry

As of January 2022, the number of enterprises in Kyrgyzstan that reported mineral production totaled 815 (National Statistical Committee of the Kyrgyz Republic, 2023b, p. 80). Table 2 is a list of the country's major mineral industry facilities.

The Ministry of Economy and Commerce was responsible for the development and implementation of policies related to industry, economic development, investments, and trade permits. The Ministry of Finance was responsible for the development and implementation of policies related to the production of precious metals and stones (excluding mining and processing of ores that contain precious metals and stones), and the use, preservation, and accounting of the State Fund of Precious Metals and Precious Stones of the Kyrgyz Republic, including its stocks and transactions. The Ministry of Natural Resources, Ecology and Technical Supervision was responsible for the development and implementation of policies

¹Where necessary, values have been converted from Kyrgyzstani soms (KGS) to U.S. dollars (US\$) at the annual average exchange rates of KGS85.68=US\$1.00 for 2022 and KGS84.77=US\$1.00 for 2021.

related to geology and subsoil use; the use and protection of natural resources; and industrial, mining, and environmental safety (Ministry of Economy of the Kyrgyz Republic, 2012; Ministry of Finance of the Kyrgyz Republic, 2022; Ministry of Natural Resources, Ecology and Technical Supervision of the Kyrgyz Republic, undated).

Mineral Trade

The value of Kyrgyzstan's total exports decreased by 20%, to \$2.19 billion in 2022 from \$2.75 billion in 2021 owing to a decrease in the value of goods exported to CIS countries. In 2022, the value of precious metal ore and concentrates exports was \$133.9 million; waste and scrap of copper, \$87.2 million; coal, \$26.9 million; cement, \$26.1 million; waste and scrap of ferrous metals, \$10.2 million; and waste and scrap of aluminum, \$5.5 million. The major export partners were, in order by the value of the exports supplied, Russia (which received 44% of Kyrgyzstan's exports), Kazakhstan (20%), Uzbekistan (11%), Turkey (6%), and the United Arab Emirates (5%) (National Statistical Committee of the Kyrgyz Republic, 2023b, p. 96, 98–99).

The value of imports totaled \$9.63 billion in 2022 and increased by 73% compared with \$5.58 billion in 2021. In 2022, the value of imports of ferrous metals was \$228.8 million; ferrous metal products, \$161.9 million; coal, \$21.7 million; and cement, \$12.3 million. The country's major import partners were, in order by the value of the imports received, China (which supplied 42% of Kyrgyzstan's imports), Russia (24%), Kazakhstan (8%), and Turkey (5%) (National Statistical Committee of the Kyrgyz Republic, 2023b, p. 96, 98–99).

Commodity Review

Metals

Antimony and Mercury.—The Deputy Chairman of the State Committee for Industry, Energy and Subsoil Use had held a meeting in 2021 to discuss issues related to the Kadamzhay complex. During that meeting, the decision was made to continue to supply electricity to the complex and to schedule debt repayments for the electricity supplied. In 2022, the President visited the Kadamzhay metallurgical facility in Batken Province. The antimony production operations at the Kadamzhay metallurgical facility were going through modernization, with financing by investors from Turkey. Companies from Turkey were also planning to invest in mercury production at the Khaydarkan mining and metallurgical complex (table 2; Kant.kg, 2019; Kudryavtseva, 2020; Barometer, 2021; Aliyev, 2022; Kabar, 2022).

Copper, Gold, and Silver.—On July 29, 2022, the process of transferring and nationalizing Kumtor Gold Co., which operated the Kumtor open pit mine, was completed. Kyrgyzaltyn OJSC held a 100% stake in Kumtor Gold. The Kumtor Mine's gold production increased by 19% to 17,305 kilograms (kg) of gold in 2022 from 14,561 kg in 2021 owing to the higher gold content of the ore supplied to the processing facility as well as an increase in the extraction of gold metal from the ore (tables 1, 2; Interfax, 2022b; Kumtor Gold Co., 2022, p. 1–3; President of the Kyrgyz Republic, 2023a).

Zijin Mining Group Co. Ltd. owned 60% of the Taldybulak Levoberezhny gold mine (Taldybulak) through its subsidiary Altynken LLC. As of 2022, the total (measured, indicated, and inferred) resources were estimated to be 51 t of ore at a grade of 4.5 g/t gold. The total (proved and probable) reserves were estimated to be 38 t of ore at a grade of 3.94 g/t gold. Taldybulak produced 3,831 kg of gold in 2022 and was expected to produce 3,700 kg of gold in 2023 (table 2; Zijin Mining Group Co. Ltd., 2023, p. 10, 28, 36, 46, 89).

As of 2022, the development of the Tulkubash goldfield within the Chaarat license area was delayed owing to the inability of Chaarat Gold Holdings Ltd. (Chaarat Gold) to secure the funding and because the company was waiting for a stronger economic environment. In addition, Chaarat Gold was working on completing a metallurgical test of drilled core from the Kyzyltash goldfield within the Chaarat license area and to determine the extent of the feasibility study area. Chaarat Gold had completed an exploration program at the Tulkubash and Kyzyltash goldfields in 2021. The life of the Tulkubash Mine was projected to be 6 years at a production rate of 3,000 kilograms per year (kg/yr) of gold. The output from the Kyzyltash underground mine was projected to be 6,200 to 9,300 kg/yr of gold. As of May 2022, the total reserves at the Tulkubash Mine were estimated to be 23.1 million metric tons at a grade of 0.87 g/t gold and containing 20,000 kg of gold. Production was expected to start in the third quarter of 2023 (Chaarat Gold Holdings Ltd., 2023a, p. 4–5, 13–15; 2023b).

Industrial Minerals

Cement.—A new cement plant was expected to be built in Tunuk-Suu in Batken Province as a joint venture between the Government and investors. The cement plant was expected to have a capacity of 1.8 million metric tons per year. The plant was expected to be completed by early 2024 (Global Cement, 2022b).

Limestone.—United Cement Group started mining the Severnaya Gryada limestone deposit near the Kant cement plant. The limestone was expected to be used for cement production at the Kant plant (Global Cement, 2022a).

Outlook

In 2022, the Government of Kyrgyzstan continued to intensify its efforts to increase mineral production. The country was trying to restructure its mineral industry by developing and mining its mineral resources and by remelting and processing waste and scrap and ores internally and mostly by local companies. The production of antimony and mercury could possibly increase, given the expected new investment by companies from Turkey. Gold production is more likely to increase, however, but will depend on the amount of investment into existing mines and the start of new operations as a result of discoveries from exploration projects.

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TABLE 1
KYRGYZSTAN: PRODUCTION OF MINERAL COMMODITIES¹

(Metric tons, gross weight, unless otherwise specified)

Commodity ²	2018	2019	2020	2021	2022
METALS					
Antimony, mine, Sb content	676 ^r	16 ^r	--	40 ^r	40
Copper, mine:					
Ore:					
Gross weight	1,002,000	1,024,000	808,000	930,000 ^e	931,000 ^e
Cu content	8,600	8,400	6,100	6,600	6,200
Concentrate:					
Gross weight	33,100	31,200	22,500	28,800	27,100
Cu content	7,600	7,400	5,400	6,900	6,500
Gold:					
Mine, Au content	27,400	26,849	22,400	24,900	25,337
Refinery	do.	1,219	1,260	1,200	4,000
Mercury, metal		20	15	7	6
Silver, mine, Ag content	kilograms	16,000	14,000	11,700	6,000 ^e
INDUSTRIAL MINERALS					
Cement, hydraulic	thousand metric tons	1,931	1,947	1,874	2,491 ^r
Clay, kaolin ^e		1,400,000	1,400,000	1,400,000	1,500,000
Gypsum		47,000	45,000 ^e	48,000	50,000 ^{r,e}
Lime		8,500	5,200	5,400 ^r	6,100 ^r
Salt, rock salt		4,655	5,604	5,600 ^e	5,600 ^e
Sand and gravel, industrial, silica		696,100	804,800	570,000	726,100 ^r
Stone, sand, and gravel, construction:					
Sand and gravel		1,351,400	1,202,600	1,165,600	1,404,800 ^r
Stone, size and shape unspecified:					
Granite, including sandstone		34,000 ^e	11,774	8,363	8,400 ^e
Marble, including limestone		102,000 ^e	102,000 ^e	51,650	95,600 ^r
MINERAL FUELS AND RELATED MATERIALS					
Coal:					
Bituminous		316,200	346,500	522,200	570,300 ^r
Lignite		2,057,500	2,187,300	1,997,500	2,483,600 ^r
Total		2,370,000	2,530,000	2,520,000	3,050,000 ^r
Natural gas	thousand cubic meters	27,300	24,400	22,400	22,200
Petroleum, crude	42-gallon barrels	1,470,000	1,733,000	1,800,000	2,000,000

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

¹Table includes data available through June 13, 2023. 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, mined fluorspar, 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 2022¹

(Thousand metric tons unless otherwise specified)

Commodity		Major operating companies, main facilities, or deposits	Location or deposit names ¹	Annual capacity ^c
Antimony, metal	metric tons	Duvatash Co. Ltd. (Dua Altın Madencilik İthalat Ve İhracat Anonim Şirketi JSC, 60% and Government, 40%)	Kadamzhay metallurgical facility, Kadamzhayskiy region, Batken Province	40
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 (Nova Resources B.V., 100%)	Bozymchak Mine, Ala-Buka district, 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% and Kyrgyzaltyn JSC, 40%)	Taldybulak Levoberezhny Mine, Kemin district	4,000
Do.		Eti Bakyr Tereksei LLC, 75%, and JSC Kyrgyzaltyn, 25%	Terek-Sai Mine, Osh Province	NA
Do.		KAZ Minerals plc (Nova Resources B.V., 100%)	Bozymchak Mine, Ala-Buka district, Jalal-Abad Province	NA
Do.	kilograms	Kumtor Gold Co. CJSC (JSC Kyrgyzaltyn, 100%)	Kumtor Mine, Jeti-Oguz district, Ysyk-Kol Province	17,000
Do.		Munson Group LLC, 70%, and JSC Kyrgyzaltyn, 30%	Makmal Mine, Toguz-Toro district	NA
Do.		Zhong Ji Mining Co.	Solton-Sary Mine, Naryn Province	NA
Refinery	kilograms	Alliance Altyn LLC	Refinery, Talas district, Talas Province	3,000
Do.	do.	JSC Kyrgyzaltyn (Government, 100%)	Makmal refinery, Jalal-Abad Province	600
Gypsum		NA	Mine in Ak-Suu, Ysyk-Kol Province	42
Limestone for cement		United Cement Group	Severnaya Gryada, Kant, Ysykaty district, Chuy Province	NA
Mercury:				
Hg content of ore	metric tons	Khaydarkan mining and metallurgical complex	Aidarken Mine, north of Aidarken town; and Khaydarkan Mine in southern Kyrgyzstan	3,300
Metal	do.	do.	Khaydarkan plant, Batken Province	6
Natural gas	million cubic meters	Kyrgyzjer Neftegaz Ltd. Liability Co. (China Huarong Energy Co. Ltd., 60%)	Changyr-Tash, Chigirchik, Eastern Izbaskent, Kara-Agach, Mayluu-Suu IV, Pereval, Susahoye, and Togap-Beshkenskoye oilfields	30 ²
Petroleum:				
Crude	thousand 42-gallon barrels	Kyrgyz Petroleum Co. (JSC Kyrgyzneftgaz, 100%)	Oilfields, Jalal-Abad Province	1,100

See footnotes at end of table

TABLE 2—Continued
KYRGYZSTAN: STRUCTURE OF THE MINERAL INDUSTRY IN 2022¹

(Thousand metric tons unless otherwise specified)

Commodity		Major operating companies, main facilities, or deposits	Location or deposit names ²	Annual capacity ^c
Petroleum:—Continued				
Refinery products	thousand 42-gallon barrels	Kant Refinery LLC	Kant oil refinery, Issyk-Alta district	2,200
Do.	do.	JSC Kyrgyzneftegaz, 100%	Refinery, Bishkek, Chuy Province	2,200
Do.	do.		Refinery, Jalal-Abad Province	500
Do.	do.	Tokmok Business Oil Refinery LLC (OJSC Xinjiang International Business Co., 100%)	Tokmok oil refinery, Kara-Balta, Chuy Province	2,900
Silver, mine output, Ag content	kilograms	JSC Kyrgyzaltyn (Government, 100%)	Makmal Mine, Toguz-Toro district	100
Do.	do.	KAZ Minerals plc (Nova Resources B.V., 100%)	Bozymchak Mine, Ala-Buka district, Jalal-Abad Province	8,000
Do.	do.	Kumtor Gold Co. CJSC (Kyrgyzaltyn JSC, 100%)	Kumtor Mine, Jeti-Oguz district Syk-Kol Province	6,000
Uranium, processed		Renova Group	Kara-Balta ore-processing plant, Zarechnoye deposit, Chuy Province	4

^aEstimated. 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.

²Capacity estimates are the total for all enterprises that produced that commodity.