



2023 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

Among world producers, Kyrgyzstan was the 5th-ranked producer of mercury, accounting for 0.5% of world production, and the 14th-ranked producer of antimony, accounting for 0.05% of world production. In terms of value, gold remained the primary mineral commodity mined in Kyrgyzstan. Other mineral commodities mined and produced in the country were cement, clay, coal, copper, crude petroleum, gypsum, lime, natural gas, salt, silica, sand and gravel, silver, and stone (granite and marble) (table 1; Klochko, 2024; Sheaffer, 2024).

Minerals in the National Economy

Kyrgyzstan's real GDP increased by 6.2% in 2023 compared with an increase of 9.0% (revised) in 2022 owing to a decrease in metal production, specifically that of gold. The nominal GDP was \$13.99 billion¹ in 2023. The industrial sector output, in terms of value, increased by 2.7% in 2023 compared with the increase of 11.4% in 2022. The mining sector output, in terms of value, increased by 3.1% in 2023 compared with the increase of 8.2% in 2022. The manufacturing sector output, in terms of value, increased by 2.0% in 2023 compared with the increase of 16.4% in 2022 (Asian Development Bank, 2024, p. 76; National Statistical Committee of the Kyrgyz Republic, 2024a, p. 79, 83, 88).

Government Policies and Programs

Kyrgyzstan is a founding member of the Commonwealth of Independent States, which was formed in 1991. In 2009, the country became one of the founding members of the Organization of Turkic States, which promotes cooperation in culture, economics, energy, politics, and other areas among Turkic countries. In August 2015, Kyrgyzstan joined the Eurasian Economic Union (EAEU), which allows goods, labor, and capital to move freely between EAEU members and encourages new investments in the development of infrastructure projects, including those in the energy and transportation sectors (Ereport.ru, 2014; Coffey, 2023; Commonwealth of Independent States, 2023; Eurasian Economic Commission, undated).

In 2023, the number of jobs in companies that received financing from the Russian-Kyrgyz Development Fund (RKDF) was 31,300. In 2024, the RKDF was expected to launch 35 projects in Kyrgyzstan. The RKDF was established in 2014 as a \$1 billion lending program geared toward the development of infrastructure, small- and medium-size businesses (including those in the manufacturing, metallurgical, and mining industries), trade, transportation, and other sections (Holzhacker and Skakova, 2019, p. 16; Russian-Kyrgyz Development Fund, 2021, p. 5; Interfax, 2022; Internet-portal SNG, 2024).

The President signed a Mining Code in 2021, which had not been adopted. The goals of this new code are to reform the mining industry in order to protect national interests, improve the productivity of the mining industry, increase transparency of regulation, ensure the safety of the population and of the environment, create a favorable investment climate, and expand opportunities for further economic growth of Kyrgyzstan. The development of minerals is expected to be conducted exclusively by Government-owned companies through 100% Government-authorized capital. When the new Mining Code is adopted, any company holding a license to develop minerals is expected to continue to operate (Ministry of Justice of Ministry of the Kyrgyz Republic, 2021; World Bank, The, 2023, p. 31).

In 2023, the Government imposed a temporary ban on the export of ferrous ingots for remelting (charge ingots) and ferrous metal scrap and waste [as classified under code 7204 of the Customs Commodity Nomenclature of the Eurasian Economic Union (also known as TN VED of EAEU)], used pipes and rails, and parts of used railway tracks and rolling stocks for 6 months. Ferrous ingots for remelting (charge ingots) and ferrous metal scrap and waste (originated in Kyrgyzstan) were expected to be processed only in Kyrgyzstan. As of June 1, 2023, the ban was expected to be renewed every 6 months. In 2023, the Government extended the ban (Interfax, 2023b; Zhaparov, 2024; Global Trade Alert, undated).

In 2022, the President signed a decree to impose a 6-month temporary ban on the exports of gold-bearing ore and concentrate, which was expected to be imposed on May 1, 2023. In 2023, however, the imposition of the ban was postponed until January 1, 2024. The JSC Kara-Balta Mining Plant was the only company that had a right to mine and process gold-bearing ore and concentrate in Kyrgyzstan in 2023 (Interfax, 2023d; Ministry of Justice of the Kyrgyz Republic, 2024).

In 2023, the Government banned coal exports by truck for 6 months, requiring most coal be exported by railroad. The ban did not apply to coal exports moving through two road checkpoints, Irkeshtam-Avtodorozhny and Torugart-Avtodorozhny, which are on the border with China. In addition, the ban did not affect the operations of state-owned Kyrgyz Coal State Enterprise (Kyrgyzkomur); the company continued to ship coal by truck through all checkpoints on the country's border. The ban was imposed to prevent domestic coal shortage and an increase in coal prices for the 2023–2024 fall and winter season (Interfax, 2023a).

Production

In 2023, production of lime increased by 75%; bituminous coal, by 53%; sand and gravel, by 31%; and cement, by 11%. Salt production decreased by 15%. Data on mineral production are in table 1.

¹Where necessary, values have been converted from Kyrgyzstani soms (KGS) to U.S. dollars (US\$) at an annual average exchange rate of KGS87.86=US\$1.00 for 2023 and KGS84.12=US\$1.00 for 2022.

Structure of the Mineral Industry

The Ministry of Economy and Commerce is responsible for developing and implementing policies related to industry and economic development and investments and trade permits. The Ministry of Finance is responsible for developing and implementing policy 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 is responsible for developing and implementing policy related to geology, the use of subsoil, and the use and protection of natural resources, industrial, mining, and environmental safety (Ministry of Economy and Commerce of the Kyrgyz Republic, 2012; Ministry of Finance of the Kyrgyz Republic, 2022; Ministry of Natural Resources, Ecology and Technical Supervision, undated). Major mineral facilities operating in 2023 are listed in table 2.

Mineral Trade

The value of exports totaled \$3.31 billion in 2023 and increased by 47% from \$2.25 billion in 2022. In 2023, the total value of exports of ore and concentrate of precious metals was \$195.8 million; waste and scrap of copper, \$81.0 million; ferrous metals, \$59.8 million; cement, \$19.3 million; and waste and scrap of aluminum, \$3.6 million. The country's major export partners were Switzerland (which received 32.9% of Kyrgyzstan's exports, by value), Russia (23%), Kazakhstan (14%), Uzbekistan (9%), the United Arab Emirates (6%), and Turkey (5%) (National Statistical Committee of the Kyrgyz Republic, 2024b, p. 99–102, 104).

The value of imports totaled \$12.35 billion in 2023 and increased by 26% from \$9.80 billion in 2022. In 2023, the value of imports of ferrous metals was \$307.3 million; ferrous metal products, \$154.8 million; coal, \$48.2 million; and cement, \$19.0 million. The country's major import partners were China (which supplied 43% of Kyrgyzstan's imports, by value), Russia (18%), Kazakhstan (7%), and the Republic of Korea (5%) (National Statistical Committee of the Kyrgyz Republic, 2024b, p. 99–102, 105).

Commodity Review

Metals

Antimony.—In 2023, an estimated 20 metric tons (t) of antimony was produced in Kyrgyzstan. In 2022, the Kadamzhay metallurgical facility in Batken Province resumed its operation owing to the investment from investors based in Turkey. The Kadamzhay facility was operated by Duvastash Co. Ltd., which was a joint venture between J Dua Altın Madencilik İthalat Ve İhracat Anonim Şirketi JSC of Turkey (60%) and the Government of Kyrgyzstan (40%) (tables 1, 2; Vasilivetsky, 2024).

Copper, Gold, and Silver.—In 2023, an estimated 32,000 kilograms (kg) of gold was produced in Kyrgyzstan,

which was a decrease of about 2% from 32,510 kg in 2022. In 2023, the Government decided to transfer its 100% share of Kumtor Gold Co., a subsidiary of Centerra Gold Inc., to 100% Government-owned OJSC Kyrgyzaltyn (Kyrgyzaltyn). The Kumtor Mine's gold production decreased by 22% to 13,567 kg of gold in 2023 from 17,305 kg in 2022. The decrease in gold production was a result of low ore grades, which averaged 2.74 grams per metric ton (g/t) in 2023 compared with 3.51 g/t in 2022, and a decrease in the gold recovery rate to 78.56% in 2023 compared with 80.42% in 2022 (tables 1, 2; Interfax, 2023c; Kumtor Gold Co., 2023, p. 3; 2024; OJSC Kyrgyzaltyn, 2024).

The Taldybulak Levoberezhny gold mine (Taldybulak) was owned by Zijin Mining Group Co. Ltd. owned through its subsidiary, Altyken LLC (60%), and Kyrgyzaltyn (40%). As of 2023, the total mineral resources (including measured, indicated, and inferred) were estimated to be 44 metric tons (t) at a grade of 3.9 g/t gold. The total mineral reserves (including proved and probable) were estimated to be 36 t at a grade of 3.82 g/t gold. The Taldybulak Mine produced 4,100 kg of gold in 2023 and was expected to produce 3,700 kg of gold in 2024 (table 2; Zijin Mining Group Co. Ltd., 2024, p. 33, 41, 75).

In October 2023, Chaarat Zaav CJSC, a subsidiary of Chaarat Gold Holding Ltd. (Chaarat Gold) of the United Kingdom, signed a conditional Engineering, Procurement and Construction contract (EPC) and an Operation and Mining contract for financing the continuation of exploration activities at the Tulkubash project with Power Construction Corporation of China Ltd. As of 2023, the Tulkubash and adjacent Kyzyltash projects, operated by Chaarat Gold, were in their pre-production stages. In addition, Chaarat Gold was working to finalize the financing for the projects. A mine life of 6 years was estimated for Tulkubash's first stage (open pit heap leach mine), during which production was expected to be 3,000 kilograms per year (kg/yr) of gold. The production of Kyzyltash was expected to be an estimated 9,300 kg/yr at the second stage of development. As of May 2022, the total mineral reserves at Tulkubash were estimated to be 23.1 million metric tons (Mt) at a grade of 0.87 g/t gold and contain 20,000 kg of gold (Marketscreener, 2023; Chaarat Gold Holdings Ltd., 2024a, p. 2, 5, 11, 75; 2024b; 2024c).

Kyrgyzaltyn was expected to finance the construction of a gold bar production plant in Kara-Balta, Chuy Province. The production of the plant was expected to start in the first quarter of 2024. The expected production capacity was not reported (Interfax, 2023e; Petchenko, 2024).

Industrial Minerals

Cement.—In 2023, 2.97 Mt of cement was produced in Kyrgyzstan, which was an increase of 11% from 2.67 Mt in 2022. A new cement plant was expected to be built in Tunuk-Suu in Batken Province as a joint venture between the Government and private investors. The cement plant was expected to have a capacity of 1.7 million metric tons per year. The plant was expected to be completed by early 2024 and create 650 jobs (Global Cement, 2022; Petrocem LLC, 2023).

Mineral Fuels and Related Materials

Coal.—In 2023, the Cabinet of Ministers of Kyrgyzstan and the Government of China signed a cross-border cooperation program for 2023–2027. Part of the program was the construction of wind and solar powerplants and development of coal deposits. Kyrgyzkomur under the Ministry of Energy and Hebei Jinsheng Mining Engineering Co. Ltd. of China agreed to develop the Tenge coal deposit 30 to 35 kilometers from Tash-Komur town, Jalal-Abad Province. The Sulukta Pole-11 coal deposit was expected to be developed in cooperation with Tomiris-Ken LLC of China, and the Torugart 1 coal deposit was expected to be developed in cooperation with Kashi Shunbaofu Trade and Export Trade Corp. of China (Cabinet of Ministers, 2023; Economist.kg, 2023; Interfax, 2023d).

Outlook

Kyrgyzstan's real GDP is expected to increase by 6.5% in 2024 according to the International Monetary Fund. The country is expected to continue to intensify its efforts to improve its mining industry by developing and mining its natural resources and remelting and processing waste, scrap, and ores domestically, mostly by local companies. The production of antimony and mercury might increase with investment from companies based in Turkey. Gold production is more likely to increase but will depend on investments into existing mines and the start of new operations as a result of exploration activities (International Monetary Fund, 2024, p. 120).

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TABLE 1
KYRGYZSTAN: PRODUCTION OF MINERAL COMMODITIES¹

(Metric tons, gross weight, unless otherwise specified)

Commodity ²	2019	2020	2021	2022	2023
METALS					
Antimony, mine, Sb content	16	--	-- ^r	22 ^r	20 ^e
Copper, mine:					
Ore:					
Gross weight	1,024,000	808,000	930,000 ^e	931,000 ^e	890,000 ^e
Cu content	8,400	6,100	6,600	6,200	5,900
Concentrates:					
Gross weight	31,200	22,500	28,800	27,100	25,800
Cu content	7,400	5,400	6,900	6,500	6,200
Gold:					
Mine, Au content	26,849	22,400	24,900	32,510 ^r	32,000 ^e
Refinery, bullion	1,260	1,200	4,800 ^r	9,100 ^r	9,200
Mercury, metal	15	7	6	5 ^r	5 ^e
Silver, mine, Ag content	14,000	16,127 ^r	16,549 ^r	17,400 ^r	17,600 ^e
INDUSTRIAL MINERALS					
Cement, hydraulic	1,947	1,874	2,491	2,667	2,969
Clay, kaolin ^e	1,400,000	1,400,000	1,400,000	1,500,000	1,500,000
Gypsum, mine	45,000 ^e	23,019 ^r	31,680 ^r	32,000 ^r	33,000 ^e
Lime	5,200	5,400	6,900 ^r	11,600 ^r	20,300
Salt, rock salt	5,604	6,400 ^{r, e}	4,600 ^{r, e}	7,138 ^r	6,100 ^e
Sand and gravel, industrial, silica	804,800	570,000	726,100	931,100 ^r	975,200
Stone, sand, and gravel, construction:					
Sand and gravel	1,202,600	1,165,600	1,404,800	1,491,900 ^r	1,957,500
Stone, size and shape unspecified:					
Granite, including sandstone	11,774	8,363	8,400 ^e	8,800 ^e	9,200 ^e
Marble, including limestone	102,000 ^e	51,650	95,600	63,200	66,400 ^e
MINERAL FUELS AND RELATED MATERIALS					
Coal:					
Bituminous	346,500	522,200	570,300	538,500 ^r	824,600
Lignite	2,187,300	1,997,500	2,483,600	3,217,200 ^r	3,259,400
Total	2,530,000	2,520,000	3,050,000	3,760,000 ^r	4,080,000
Natural gas	24,400	22,400	22,200	29,900	27,500
Petroleum, crude	42-gallon barrels	1,733,000	1,800,000	2,000,000	2,160,000
					2,220,000

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

¹Table includes data available through July 18, 2024. 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, fluorspar, mined mercury, molybdenum, refined antimony, refined petroleum, 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 2023¹

(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	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		Ja-Young-Pirim Co.	Aravan cement plant, Aravan district, Osh Province	260
Do.		OsOO Ak-Sai Cement	OsOO Ak-Sai cement plant, Kyzyl-Kiya, Batken Province	400
Do.		OsOO Sinzhi-Pirim	OsOO Sinzhi-Pirim cement plant, Osh Province	20
Do.		United Cement Group	LLC TechnoLin cement plant, Kant, Ysykaty district, Chuy Province ²	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 investors, 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 Mine, Ala-Buka district, Jalal-Abad Province	1,100
Mine output, concentrate gross weight		do.	do.	34
Gold:				
Mine, Au content	kilograms	Altynken LLC (Zijin Mining Group Co. Ltd., 60%, and Kyrgyzaltyn JSC, 40%)	Taldybulak Levoberezhny Mine, Kemin district, Chuy Province	4,000
Do.		Eti Bakyr Tereksei LLC, 75%, and OJSC Kyrgyzaltyn, 25%	Terek-Sai Mine, Osh Province	NA
Do.		KAZ Minerals plc	Bozymchak Mine, Ala-Buka district, Jalal-Abad Province	NA
Do.	kilograms	Kumtor Gold Co. [OJSC Kyrgyzaltyn (Government, 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, Jalal-Abad Province	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.	OJSC Kyrgyzaltyn (Government, 100%)	Makmal refinery, Jalal-Abad Province	600
Do.	do.	JSC Kara-Balta Mining Plant [OJSC Kyrgyzaltyn (Government, 100%)]	Refinery, Chuy 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

See footnotes at end of table

TABLE 2—Continued
KYRGYZSTAN: STRUCTURE OF THE MINERAL INDUSTRY IN 2023¹

(Thousand metric tons unless otherwise specified)

Commodity		Major operating companies, main facilities, or deposits	Location or deposit names	Annual capacity ^c
Natural gas	million cubic meters	Kyrgyzjær Neftegaz Ltd. Liability Co. (China Huarong Energy Co. Ltd., 60%)	Changyr-Tash, Chigirchik, Eastern Izbasket, Kara-Agach, Mayluu-Suu IV, Pereval, Susahoye, and Togap- Beshkenskoye oilfields	30
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Petroleum:				
Crude	thousand 42-gallon barrels	Kyrgyz Petroleum Co. (Kyrgyzneftgaz)	Oil fields, Jalal-Abad Province	1,100
Refinery products	do.	Kant Refinery LLC	Kant oil refinery, Ysyk-Ata district, Chuy Province	2,200
Do.	do.	OJSC Kyrgyzneftegaz, 100%	Refinery, Bishkek, Chuy Province	2,200
Do.	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	OJSC Kyrgyzaltyn (Government, 100%)	Makmal Mine, Toguz-Toro district, Jalal-Abad Province	100
Do.	do.	KAZ Minerals plc	Bozymchak Mine, Ala-Buka district, Jalal-Abad Province	8,000
Do.	do.	Kumtor Gold Co. [OJSC Kyrgyzaltyn (Government, 100%)]	Kumtor Mine, Jeti-Oguz district, Ysyk-Kol Province	6,000

^cEstimated. 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.

²The plant was mothballed in 2023.