



2011 Minerals Yearbook

KYRGYZSTAN

THE MINERAL INDUSTRY OF KYRGYZSTAN

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Kyrgyzstan has a variety of mineral resources (ferrous and nonferrous metals, including precious metals; industrial minerals, including semiprecious gemstones; and uranium). The country is a major world producer of mercury, molybdenum, and uranium. In 2011, gold was the primary mineral (in terms of value) mined in the country. Other minerals being mined included antimony, clay, coal, fluorspar, gypsum, limestone, materials for making cement, mercury, natural gas, petroleum, sand and gravel for aggregate, silica, and silver. Kyrgyzstan has deposits of other minerals that were not being mined. They include arsenic, bauxite, copper, iron ore, lead, rare-earth metals, sulfur, tin, tungsten, and zinc (Russian American Chamber of Commerce in the USA, 2007; Brooks, 2012; Polyak, 2012; U.S. Central Intelligence Agency, 2012; Welcome.kg, 2012).

After the dissolution of the Soviet Union in 1991, mineral production in Kyrgyzstan (except for gold) was in decline. In the past several years, however, the Government actively sought investors interested in prospecting, developing, mining, and processing mineral resources. The development of the mineral sector in modern Kyrgyzstan has encountered serious obstacles—licensing problems and conflicts between mining companies and the local population. Such conflicts often have been a reflection of either environmental concerns or issues related to what the local population considered to be insufficient contribution of the mining companies to the local economy. In March 2011, arson at the Talas Copper Gold Co. site in Talasskaya Oblast¹ resulted in almost \$1 million in damages. Other mining companies working in the country encountered public meetings and demonstrations, demands that the companies contribute to local infrastructure projects, environmental protests, and other actions. Both the Government and nongovernmental organizations were working to find solutions to the conflicts. The Government expected that a new mining code, which was under development in 2011, would provide a legal basis for a better balance between the interests of the investors, the local community, and the Government (Bogatyrev, 2011; Kyrgyz Committee for Human Rights, The, 2011; Tynan, 2011).

Minerals in the National Economy

In 2011, Kyrgyzstan's gross domestic product (GDP) increased by 23.9% to \$5.92 billion.¹ Industrial production increased by 27.3% to \$3.51 billion and contributed 59.2% to the total value of the GDP. In 2011, the country had 2,040 industrial enterprises that employed 195,000 workers. The value of Kyrgyzstan's exports increased in 2011 by 12.8% to \$2.25 billion, and the value of the county's imports increased by 32.2% to \$4.26 billion. The ratio of exports to imports was

52.7% (National Statistical Committee of the Kyrgyz Republic, 2012a, b; U.S. Department of State, 2012).

The main export commodities included cotton, garments, gold, hydropower, machinery, meat, mercury, shoes, tobacco, uranium, and wool. Kyrgyzstan's leading export partners were Uzbekistan, which received 25.4% of Kyrgyzstan's exports, Russia (22.2%), Kazakhstan (20.1%), China (7.8%), the United Arab Emirates (5.5%), Afghanistan (5.0%), and Turkey (4.2%). The leading export item was gold mined at the Kumtor Mine by Centerra Gold Inc. of Canada; gold accounted for 51.1% of the total export volume in 2011. The main import commodities were chemicals, foodstuffs, oil and gas, and machinery and equipment. The country's primary import partners were China, which supplied 59.8% of Kyrgyzstan's imports, Russia (13.9%), and Kazakhstan (5.2%) (National Statistical Committee of the Kyrgyz Republic, 2012a; U.S. Department of State, 2012).

Government Policies and Programs

In the past decade, the Government actively worked on attracting investments in its mineral industry. As of the beginning of 2011, Kyrgyzstan had 998 active licenses for exploration, development, and mining of mineral resources. Out of the total, 174 licenses were for mineral exploration, 215 were for mine development, and 609 were for mining. At the same time, only a few projects resulted in mineral production, and many residents in Kyrgyzstan were expressing concerns that, despite a high number of licenses, the country was not mining minerals on a large scale and therefore was not getting the benefits from its natural resources. To address these concerns, the Ministry of Geology in 2010 revoked 550 licenses, mostly for the resources that were not being actively developed (Vb.kg, 2011).

In addition, the country was preparing a conceptually new mining code designed to outline the principles of mining industry regulation and the coordination of relations between investors and the Government. The development of the new law was still in the early stages, and a special working group that included many business representatives was in the process of putting together the first draft. In the meantime, the current mining code was being amended. In 2011, four amendments were introduced and one of them was adopted; the other three amendments were still in the discussion stage. The new amendment passed in 2011 states that all prospecting, development, and mining licenses can be issued only as a result of tenders and auctions. The Ministry of Natural Resources had retained the authority to issue licenses as a result of direct negotiations when either the deposits are considered to be small, or if only one party is interested in a particular resource object. This amendment went into effect starting on November 1, 2011, and was expected to make the process of issuing mineral licenses more transparent (Vb.kg, 2011).

¹Where necessary, Kyrgyzstani soms (KGS) were converted to U.S. dollars (US\$) at the average annual rate of KGS46.14=US\$1.00 for 2011 and KGS45.96=US\$1.00 for 2010.

Production

In 2011, the estimated production of mined antimony and antimony metal combined increased by 114%, and the estimated production of gold increased by 14.8%. Production of coal increased by 46%; that of cement, by 33.6%; natural gas, by 16%; and petroleum, by 9.1%. The output of lime decreased by 60%, and that of metal mercury, by 43%. Other data on mineral production are in table 1 (National Statistical Committee of the Kyrgyz Republic, 2012b).

Commodity Review

Metals

Antimony.—The Kadamzhay mining and metallurgical complex (KGMK) located in the Batkensky region of the country was the only antimony producer in Kyrgyzstan. Known resources of antimony ores in the region were concentrated at the Abshir, the Big Khaydarkan, the Kadamzhay, and the Tereksay deposits, and together amounted to 16 million metric tons (Mt). The estimated amount of antimony metal in those ore deposits was 272,000 metric tons (t). KGMK was planning to adopt new technologies to process oxidized and arsenic-containing ores and expected that those new technologies would allow the complex to continue uninterrupted production for the next 15 to 20 years. In 2011, KGMK produced an estimated 1,800 t of antimony, or 2.7 times more than it produced in 2010 (table 1; Elkeeva, 2012).

Gold.—As of 2007, Kyrgyzstan had 48 known gold deposits with combined resources of 2,150 t of gold. Only a few of the deposits, however, were mined. The largest of the existing mines, Kumtor gold mine, was located about 350 kilometers (km) southeast of Bishkek and about 60 km north of the border with China. The Kumtor Mine was operated by Canadian company Centerra Gold Inc. In 2011, Centerra Gold produced 6.02 Mt of gold ore and extracted 583,000 troy ounces (18.1 t) of gold content. In 2011, output from the Kumtor Mine contributed 11.7% to the GDP of Kyrgyzstan and 26.1% to the country's total industrial production, and Centerra Gold paid \$138.4 million in taxes and customs duties to the Government on the output from the mine. Mining operations at Kumtor were carried out by traditional open pit mining methods. The main loading fleet operating at the end of 2011 included 16 hydraulic excavators and 3 front-end loaders. Because the waste tonnage expected to be mined between 2011 and 2015 was forecast to increase substantially, the mining fleet was expected to be increased in order to accomplish the mining production plans (Centerra Gold Inc., 2012).

The second-ranked gold mine in Kyrgyzstan, the Makmal Mine, was operated by OAO KyrgyzAlтын and was wholly owned by the Kyrgyz Government. The Makmal Mine is located 630 km from Bishkek in Dzhahalal-Abadskaya Oblast'. In 2011, the Makmal Mine produced about 505 kilograms (kg) of gold, which was a significant increase compared with the 240.5 kg produced in 2010 (KyrgyzAlтын, 2011).

In 2011, several other gold deposits were either at the exploration stage or in the process of being developed. The Jerooy and the Taldy-Bulak Levoberezhnyi deposits were the

second- and third-ranked deposits in Kyrgyzstan after Kumtor. Ownership of the Jerooy deposit had changed five times during the past decade, and production had not yet started. The Taldy-Bulak Levoberezhnyi was jointly owned by Summer Gold Co. of Kazakhstan (40%) and Zijin Mining Group of China (60%). Another promising project included Ishtamberdy deposit in the Chatkal region in southern Kyrgyzstan. Lingbao Gold Co. Ltd. of China was constructing a mining and metallurgical complex at the mine site and was planning to mine and process 300,000 metric tons per year of gold ore by 2012. The Unkurtash gold deposit was being developed by Highland Gold Mining Ltd. (HGM) of the United Kingdom. In 2011, HGM was planning to invest \$30 million in exploration of Unkurtash (MetalDaily.ru, 2011).

OcOO Kazakhmys Gold Kyrgyzstan had invested a total of \$130 million since 2009 into development of the Bozymchak gold deposit in Dzhahalal-Abadskaya Oblast'. In addition to gold, the Bozymchak deposit contains silver and copper. The construction of the mine had been scheduled to be completed by the end of 2011, but at the time of this report, no information was available regarding its completion. Initial production was to be conducted by open pit method; in 2014, production would switch to the underground method. The mine was expected to provide employment to 500 workers from Kyrgyzstan and Kazakhstan (MiningExpo.ru, 2011).

Mercury.—The Khaydarkan mercury mining and metallurgical complex continued to mine the Khaydarkan and the Novoye deposits. The complex included two underground mines, a beneficiation plant, and a metallurgical processing facility. In 2009, the mine was flooded, and the management was trying to conduct necessary repairs. Following the accident, production of mercury metal decreased in 2011 to 85,000 t. Production was expected to increase once the necessary repairs are completed; however, obtaining commercial credit for the enterprise was difficult, and the repairs were delayed (EITI.kg, 2011).

Primary mercury production was considered ecologically dangerous, and the United Nations (UN) Chemicals Program put the Khaydarkan complex on the list of environmentally unsafe sites. The volume of mercury production as of 2011 was much lower than the previous production amount; however, because the complex was the single major employer in the settlement of Khaydarkan, which had 11,000 residents, a complete closure would lead to a very high level of unemployment in the area (Noruzbaev, 2009).

Industrial Minerals

Rare Earths.—In Kyrgyzstan, the Kutessai I, II, and III deposits in Chuy Valley contain rare-earth elements. During the Soviet times, 15 of the elements were mined by open pit method at Kutessai II. In 2009, Kutessai Mining Co. (Kutessai), whose parent company was Stans Energy of Canada, had obtained a 3-year license for mining Kutessai II from the State Agency on Geology and Mineral Resources. During the next 3 years, the company was unable to start production, but gave 5.8 million soms (\$126,000) as a charitable donation to the local government of Ak-Tyuz. In 2011, Kutessai started a new round of negotiations with the State Agency on Geology and Mineral Resources for

renewal of its license through 2014. As of 2011, Kutessai was conducting exploratory drilling at the Kutessai II deposit and was investigating the ore composition (Dudka, 2012).

Mineral Fuels and Related Materials

Uranium.—The Kara-Balta mining complex (KGRK) started production in 1955 and for many years was one of the leading processors of raw uranium for the nuclear industry of the Soviet Union. The capacity of the complex at that time was about 3,000 t/yr of uranium oxide (U₃O₈). After not producing uranium for several years, in 2007, Ural Platina Holding Co. (a part of GK Renova of Russia) won a tender for acquisition of the Government's 72.28% share of KGRK, for which it paid about \$4 million. To start production, KGRK signed contracts with the joint-venture company Zarechnoe of Russia and Kazakhstan and with NAK Kazatomprom of Kazakhstan. Total investment in KGRK at that time was estimated to be \$30 million. The production of uranium from raw materials mined in southern Kazakhstan started in 2007, and, by 2009, KGRK had reached the production levels of the Soviet period. In 2009, KGRK produced 2,574 t of uranium worth \$17.4 million (Atomic-energy.ru, 2010; Starchak, 2011).

KGRK had a 360-hectare (about 900-acre) storage facility of uranium tailings that, according to preliminary estimates, contained 5,000 t of nuclear waste. GK Renova had access to technologies to process nuclear waste and would be capable of processing the uranium waste at KGRK. Processing tailings per unit of output is less costly than processing mined uranium (Kara-Balta Mining Complex, 2012).

Outlook

Kyrgyzstan is actively trying to attract foreign investment into its mineral industry and to start production at new deposits. In accordance with the Government's Medium Term Program of Development for 2012–2014, at least four new deposits—the Bozymchak copper, gold, and silver deposit; the Ishtamberdy gold deposit; the Jerooy gold deposit; and Taldy-Bulak Levoberezhnyi gold deposit—are to start production. The Government expects that tax revenues from the mineral industry in 2014 will amount to about 12 billion soms (about \$267 million). Moreover, the Government expects that construction of new mines and new mineral production could create more than 25,000 jobs.

A majority of foreign companies in the country are likely to continue to direct their efforts at exploration of gold deposits. In the near future, increased production of other mineral resources (especially antimony, rare earths, and uranium) is expected.

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TABLE 1
KYRGYZSTAN: PRODUCTION OF MINERAL COMMODITIES^{1,2}

(Metric tons unless otherwise specified)

Commodity	2007	2008	2009	2010	2011
METALS					
Antimony:					
Mine output, Sb content ^c	1,000	700	700	700	1,500
Metal and compounds	150	242	918	842	1,800 ^c
Gold, mine output, Au content kilograms	10,559	18,132	16,950	18,300	21,000 ^c
Mercury, metal do.	331,500	290,000	320,000	150,000	85,000
INDUSTRIAL MINERALS					
Cement	1,229,500	1,218,100	579,400	759,700	1,014,800
Lime, dead-burned	12,900	8,700	4,700	6,500	2,600
Sands cubic meters	597,900	836,200	800,000	850,000	850,000
MINERAL FUELS AND RELATED MATERIALS					
Coal:					
Bituminous	37,195	55,338	68,800	65,000	94,000
Lignite	358,338	437,263	538,100	510,000	745,000
Total	395,533	492,601	606,900	575,000	839,000
Natural gas thousand cubic meters	15,000	17,400	15,400	22,800	26,500
Petroleum, crude:					
In gravimetric units	68,500	71,000	77,300	82,800	90,300
In volumetric units ^c 42-gallon barrels	498,000	516,000	562,000	602,000	656,000
Uranium, processed:					
U content	NA	1,097	2,574	2,000	2,000 ^c
U ₃ O ₈ content	NA	1,309	3,071	2,385	2,385

^cEstimated; estimated data are rounded to no more than three significant digits; may not add to totals shown. do. Ditto. NA Not available.

¹Table includes data available through November 20, 2012.

²In addition to the commodities listed, Kyrgyzstan is thought to produce a number of other mineral commodities, including clays, copper, fluorspar, gypsum, kaolin, mined mercury, molybdenum, rare earths, salt, sand and gravel, silver, tin, and tungsten, but available information is not adequate to estimate production.

TABLE 2
KYRGYZSTAN: STRUCTURE OF THE MINERAL INDUSTRY IN 2011¹

(Metric tons unless otherwise specified)

Commodity	Major operating companies, main facilities, or deposits	Location or deposit names	Annual capacity ^c
Antimony:			
Sb content of ore	Kadamzhay mining and metallurgical complex (ATF Invest, a subsidiary of ATF Bank of Kazakhstan, 70.4%), which included the Kadamzhay Mine and the Terek-Sayskiy Mine	Batkenskaya Oblast'	2,400 ²
	Khaydarkan mining and metallurgical complex	Khaydarkan region	
Metal and compounds	Kadamzhay metallurgical facility (ATF Invest, a subsidiary of ATF Bank of Kazakhstan, 70.4%)	Kadamzhayskiy Rayon	28,000
Cement	Kantskiy cement plant	Kant	1,500,000
Coal	Seven underground mines and five open pits among the following deposits: Almalyk, Dzhergalan, Kara-Kiche-Kok-Yangak, Kyzyl-Kiya, Sulyukta, and Tashkumyr	Southwestern, central, and northeastern parts of the country	2,200,000 ²
Copper	Talas Copper Gold Co.	Talasskaya Oblast'	NA
Fluorspar, concentrate	Khaydarkan mining and metallurgical complex	Khaydarkan deposit	5,000
Gold:			
Au content of ore	Kumtor Gold Co. (Centerra Gold Inc.)	Kumtor deposit	22
Do.	OAo KyrgyzAltyn (Government, 100%)	Makmal deposit	3
Do.	kilograms Solton-Sary Mine	Naryn	500
Do.	Talas Gold	Jerooy-Bashi, Pereval; Talasskaya Oblast'	NA
Do.	Taldy-Bulak Levoberezhny deposit (Summer Gold Co., 40%, and Zijin Mining Group, 60%)	NA	NA
Do.	Ishtamberdy deposit (Lingbao Gold Co. Ltd.)	Chatkal region	NA
Do.	Unkurtash gold deposit (Highland Gold Mining Ltd.)	NA	NA
Do.	Bozymchak gold deposit (OcOO Kazakhmys Gold Kyrgyzstan)	Dzhalal-Abadskaya Oblast'	
Refined	Kara-Balta refinery	Chuyskaya Oblast'	NA
Mercury:			
Hg content of ore	Khaydarkan mining and metallurgical complex	Khaydarkan and Novoye deposits	700 ²
Metal	do.	Khaydarkan deposit	1,000
Molybdenum, for nonmetallurgical uses	Kara-Balta mining and metallurgical complex	NA	NA
Do.	Molibden Joint Stock Co.	Chuyskaya Oblast'	NA
Natural gas	million cubic meters Kyrgyzzmunayzat	Approximately 300 wells; Changyr-Tash, Chigirchik Pereval, Izbaskentskoye, Kara-Agach, Mayлуу-Suu, Susahoye, and Togap-Beshkenskoye deposits	100 ²
Petroleum	do.	do.	150,000
Do.	Kyrgyz Petroleum Co.	Djalal-Abadskaya Oblast'	NA
Rare earths:			
Ore	Kutessai Mining Co.	Kutessai II deposit, Chuy Valley	300,000
Rare-earth metals	Kyrgyz chemical and metallurgical plant	Orlovka	800
Silver	Karagoyskoye deposit	Oshskaya Oblast'	NA
Do.	Kumyshtag deposit	Talasskaya Oblast'	NA
Tin	Enil'chek JSC mining enterprise	Atdzhaylau deposit	150
Do.	do.	Trudovoye deposit	350
Do.	Tyanshanolovo mining and beneficiation complex	Sary-Dzhas field	NA
Do.	Uchkoshkon deposit	do.	NA
Tungsten	Enil'chek JSC mining enterprise	Atdzhaylau deposit	90
Do.	do.	Trudovoye deposit	95,600

See footnotes in the end of the table

TABLE 2—Continued
 KYRGYZSTAN: STRUCTURE OF THE MINERAL INDUSTRY IN 2011¹

(Metric tons unless otherwise specified)

Commodity	Major operating companies, main facilities, or deposits	Location or deposit names	Annual capacity ^c
Uranium, processed	Kara-Balta mining complex (GK Renova)	Zarechnoye deposit, Chuyskaya Oblast'	3,600
Do.	Linia Prava (LPU) (Nimrodel Resources, 100%)	Southern Fergana Valley, Batkenskaya Oblast'	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 that of locations.

²Capacity estimates are totals for all enterprises that produce that commodity.