



2012 Minerals Yearbook

TAJIKISTAN

THE MINERAL INDUSTRY OF TAJIKISTAN

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Tajikistan reportedly has more than 600 mineral deposits containing such minerals as anthracite coal, antimony, bismuth, boron, copper, gemstones, gold, iron ore, lead, manganese, molybdenum, natural gas, nickel, petroleum, phosphor, salt, silver, strontium, tin, tungsten, uranium, and zinc. Mining that was successfully developed in the 1980s had declined during the 1990s because of economic and political difficulties in the country. In the past decade, Tajikistan was expending significant effort to increase its mineral production (Tajik Gateway, 2013).

Tajikistan had significant hydropower resources. The hydropower plants with the largest electricity generating capacity were the Nurek plant [which had a capacity of 3,000 megawatts (MW)], the Sangtuda plant (670 MW), and the Baipaza plant (600 MW). Another hydropower plant—the Rogunskaya plant on the Vaksh River—was under construction. In the absence of significant reserves of oil and gas, Tajikistan relied on imported hydrocarbons for its industrial production; most of the imported hydrocarbons were from Russia, Turkmenistan, and Uzbekistan (European Bank for Reconstruction and Development, 2010).

Minerals in the National Economy

In 2012, Tajikistan's gross domestic product (GDP) was reported to be \$7.6 billion and real GDP growth was 7.5%.¹ Industrial production accounted for 22.8% of the GDP; in nominal terms, industrial production increased by 10.4% compared with that of 2011. Production of mineral products constituted a significant portion of the national economy. Mining and quarrying made up 12.7% of the value of industrial production, and the rate of growth of the mining and quarrying sector was 24.0% (Agency on Statistics Under the President of the Republic of Tajikistan, 2012, 2013; U.S. Central Intelligence Agency, 2013).

In 2012, the country's revenue from exports amounted to \$1.36 billion, which was far less than the \$3.78 billion that it spent on imports. The main categories of exported commodities were, in order of the contribution to export revenue, basic metals, which accounted for 40.9% of total exports; mineral products (22.4%); textiles and products made out of them (19.5%); and vehicles, machinery, and equipment (6.2%). A single export category (aluminum) contributed 39.5% of the total export revenue. Overall, Tajikistan's export revenue became more diversified compared with that of 2011; the share of aluminum was reduced to 39.5% from 54.6% in 2011, and the share of cotton increased to 16.5% from 15.7% in 2011. The main export partners were, in order of export value, Turkey (which received 36.3% of Tajikistan's exports), Afghanistan (14.1%), China (13.3%), Russia (7.9%), Kazakhstan (7.5%), Switzerland (6.7%),

and Iran (4.9%). The main import categories were, in order of export value, vehicles, machinery and equipment (26.6%); mineral products (20.2%); chemical products (12.6%); plants and products made out of them (10.4%); basic metals and products made out of them (6.3%); and timber and products made out of wood (5.4%). The main import partners were, in order of the value of the imports, Russia (which supplied 25.4% of Tajikistan's imports), Kazakhstan (16.0%), China (12.9%), the United States (5.1%), Turkmenistan (4.1%), Iran (4.0%), and Lithuania (3.8%) (Agency on Statistics Under the President of the Republic of Tajikistan, 2012, 2013; U.S. Central Intelligence Agency, 2013).

Production

In 2012, Tajikistan decreased production of natural gas by 40.6%; cement, by 22.4%; and aluminum, by 2%. Coal production increased by 73.9%; that of gold, by 7.2%; mercury output, by an estimated 6.7%, and lead output, by an estimated 5%. These and other production data are in table 1.

Structure of the Mineral Industry

Table 2 is a list of major mineral industry facilities.

Commodity Review

Metals

Aluminum.—The aluminum smelter Tajik Aluminum Co. (TALCO) was Tajikistan's only aluminum producer; it had the capacity to produce 517,000 metric tons per year (t/yr). In 2012, the smelter produced 272,500 metric tons (t), which was a 2.0% decrease compared with the output in 2011. The decrease in production was attributed to TALCO's need for modernization as well as to production interruptions related to the shortages of natural gas in the country (Ergasheva, 2013a).

Gold.—In 2012, Tajikistan produced 2,401 kilograms (kg) of gold, which was an increase of 7.2% compared with the output in 2011. In 2012, the enterprises that produced gold in Tajikistan were the Tajik-Chinese joint venture SP Zerafshan, the Tajik-British joint venture Darvaz, the Tajik-Canadian joint venture Aprelevka, Government-owned Tilloi Tochik [Tajik Gold], the Tajik-Kyrgyz joint venture OOO Takom Gold, and the private Tajik company Arteli Odina (Ergasheva, 2013b).

The leading gold producer in Tajikistan, SP Zerafshan, produced 1,511 kg of gold, which was 182 kg more than it produced in 2011. The company mined several deposits in Sughd Oblast' in the northern part of the country, including the Tarror deposit, the Jilau deposit, the Khirskhona deposit, and the Olympiyskoye deposit. In 2012 the Zijin Mining Group reevaluated the company's gold resources and increased them to 184 t of gold (MinerJob.ru, 2012d; BizTass, 2013).

¹Where necessary, values have been converted from Tajikistani somoni (TJS) to U.S. dollars (US\$) at an annual average exchange rate of TJS4.76=US\$1.00 for 2012.

The country's second-ranked gold enterprise, Aprelevka, produced 442 kg of gold, which was 3 kg more than it produced in 2011; it also produced about 1.5 t of silver. The company's plan called for it to increase gold output to 1 t/yr and silver output, to 3 t/yr by 2015. Aprelevka was planning to invest \$100 million in enterprise development. As of 2012, the company employed 850 workers, and it was planning to increase the number of employees to between 1,200 and 1,300 workers by 2015 (MinerJob.ru, 2012j).

In November 2011, the Government of Tajikistan issued a gold mining license to Kryso Resources Ltd. of the United Kingdom to produce gold at the Pakrut deposit. The company was planning to start operations at the end of 2013 and expected to be able to produce about 2 t/yr of gold and silver as a byproduct during the first several years of mining. According to Kryso's initial estimates, the Pakrut deposit had gold reserves of 111.3 t contained in ore grading up to 4.43 grams per metric ton (g/t) gold, which is considered to be a very high grade. Kryso Resources had spent about \$20 million on prospecting work in the area and was planning to spend another \$25 million on plant construction; the company's planned total investment in Pakrut was estimated to be \$108 million (MinerJob.ru, 2012a, b; Tjkurs4all.ru, 2012).

In February, the Government announced that it had begun accepting applications for participation in an international tender for development of two gold deposits—the Chore deposit and the Konchoch deposit, both of which are located in Ayninskiy Rayon of Sughd Oblast'. The tender was expected to be conducted during 2012. According to the tender rules, priority would be given to projects that would produce more final products within the borders of the country. The Chore deposit is characterized by gold-arsenic ores; the average grade is estimated to be between 2.8 and 8.2 g/t gold. The Konchoch deposit contains antimony, mercury, gold, and silver; previously, Konchoch was considered to be purely a mercury deposit. Two other deposits—the Ikar tungsten deposit and the Gumas nickel-copper-platinum deposit, both of which are located in the Gorno-Badakhshanskaya Autonomous Region—were also expected to be put up for tender (MinerJob.ru, 2012e).

Silver.—In 2012, Tajikistan produced 1,767 kg of silver, which was practically unchanged compared with production in 2011. In 2010, the Government announced an international tender for the right to develop the Koni Mansur Kalon [Big Konimansur, also known as Konimansuri] polymetallic deposit. The deposit had been prospected in the 1970s and was one of the largest silver deposits in the world. It contained about 1 Mt of ore containing 49 g/t silver, 0.49% lead, and 0.38% zinc. Total resources of silver at the Koni Mansur Kalon were reported as 70,000 t. As of October 2012, the only major contender was an international consortium led by Kazzinc of Kazakhstan. Other participants in the consortium were Glencore International plc of Switzerland, Konimansur of Kazakhstan, and the ore refinery OAO Adrasman of Tajikistan. The Government expected that the total proposed investment would amount to between \$3 billion and \$4 billion (KyrTag.kg, 2012; MinerJob.ru, 2012g, i).

In November, the Nukrafon company, which planned to specialize in silver production, opened in the city of Istiklol in

the Sogd region of northern Tajikistan. The company would operate in Kanchol Valley. According to press reports, the enterprise would be working with a Swiss mining company and planned to hire 200 employees (MinerJob.ru, 2012c).

Mineral Fuels

Coal.—In 2011, Tajikistan produced about 412,000 t of coal, which was an increase of 73.9% compared with production in 2011. Tajikistan had significant reserves of coal amounting to 36 deposits containing, according to some sources, 3,600 Mt of coal; proven resources were estimated to be 714 Mt (Naumova and Chorshanbiyev, 2012). Tajikistan had a variety of coal types, from lignite and bituminous to the highest grades of anthracite. In 2012, 10 coal deposits were mined by 14 companies; 6 of the companies were Government owned. The leading producers were OAO Anguisht, SP Anzob, and UP Fon-Yagnob. UP Fon-Yagnob, which was located in Zarafshan Valley, produced 38.8% of the country's total output. On May 1, the Government introduced a ban on coal exports. The reason for the ban was the shortage of natural gas, which had effectively led to reduced output or even complete stoppage of several enterprises. For example, TALCO and Tajikcement were unable to work at full capacity, and SP Azot was idle throughout the year. The Government was encouraging enterprises to undertake renovations to be able to use coal as their primary fuel source. As of the end of 2012, 154 industrial enterprises in Tajikistan were using coal as their main source of energy (MinerJob.ru, 2012f, h; 2013; Naumova and Chorshanbiyev, 2012).

Oil and Natural Gas.—In July, Tethys Petroleum Ltd. of the United Kingdom announced that it had discovered large resources of oil and gas in Tajikistan. The company reported estimated gross unrisksed mean recoverable resources of 27.5 billion barrels of oil equivalent, of which about 69% was natural gas and 31% was oil and condensate. The company was planning to refine those estimates using seismic data. In December, Tethys signed an agreement with Total S.A. of France and China National Oil and Gas Exploration and Development Corp. (CNODC), a division of the leading Chinese oil and gas producer China National Petroleum Corp. (CNPC), about joint geologic work in Tajikistan. Tethys was planning to start production in the second part of 2014 (Rosbalt.ru, 2012; Tethys Petroleum Ltd., 2012; Pressa.tj, 2013).

Outlook

Tajikistan has significant undeveloped mineral resources, including a large number of metals, rare-earth minerals, and uranium. During the past decade, the country started to intensify its efforts to revive its mineral industry and increase its mineral production, which had decreased significantly or ceased during the 1990s after the breakup of the Soviet Union. In particular, the Government was holding mining tenders and was trying to attract foreign investment into its mineral industry. Given those efforts, it is likely that Tajikistan will be able to increase its output of gold and silver in the next few years and perhaps will continue to expand the production of coal and cement. The country, however, currently does not produce enough energy to

support its industrial sector. The recent trend to provide energy for most of its industry by burning coal (rather than by using imported natural gas, as it has done in the past) may lead to additional long-term environmental problems. On the other hand, the recent discovery of large reserves of hydrocarbons, if further confirmed and eventually developed and produced, could help to address the country's energy shortages and, perhaps, give a boost to the national economy.

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TABLE 1
TAJKISTAN: PRODUCTION OF MINERAL COMMODITIES¹

(Metric tons unless otherwise specified)

Commodity ²	2008	2009	2010	2011	2012
METALS					
Aluminum, primary	339,450	359,385	348,850	278,000	272,500
Antimony ore, Sb content ^c	2,000	2,000	2,000	4,500 ^r	4,700
Gold kilograms	1,672	1,361	2,049	2,240	2,401
Lead ore, Pb content ^c	800	800	800	800	840
Mercury, Hg content ^c	30	30	30	30	32
Silver, Ag content kilograms	3,110	1,268	2,652	1,764 ^r	1,767
INDUSTRIAL MINERALS					
Cement, hydraulic	190,400	195,000	288,200	299,400 ^r	232,400
Gypsum	8,500	26,400	14,600	16,000 ^e	16,000 ^e
Nitrogen, N content of ammonia	23,000	--	--	--	--
Salt ^e	52,000	52,000	52,000	27,000 ^r	27,954 ³
MINERAL FUELS AND RELATED MATERIALS					
Coal, bituminous and lignite	198,500	178,300	199,700	236,800	411,789
Natural gas thousand cubic meters	16,100	19,900	22,800	18,800	11,170
Petroleum, crude:					
In gravimetric units	25,900	26,200	27,000	28,700	29,918
In volumetric units 42-gallon barrels	85,900	79,600	78,500	83,440	86,762

^eEstimated; estimated data are rounded to no more than three significant digits. ^rRevised. -- Zero.

¹Table includes data available through June 27, 2013.

²In addition to the commodities listed, Tajikistan had produced a number of other mineral commodities in the past, but available information is inadequate to determine if production was still taking place.

³Reported figure.

TABLE 2
TAJKISTAN: STRUCTURE OF THE MINERAL INDUSTRY IN 2012¹

(Metric tons unless otherwise specified)

Commodity	Major operating companies and major equity owners	Location of main facilities	Annual capacity ^e
Aluminum	TALCO aluminum smelter [formerly the Tajikistan Aluminum Smelter (TadAZ)]	Tursunzade	517,000
Antimony, ore	Anzob mining-beneficiation complex	Dzhzhikrutskoye Sb-Hg deposit	700,000
Antimony, metal	Isfara hydrometallurgical plant	Isfara	500
Arsenic	Mosrif deposit	NA	NA
Bismuth	Isfara hydrometallurgical plant	Isfara	500
Do.	Leninabad mining-beneficiation complex	Yuzhno-Yangikanskiy deposit	25
Bismuth, copper, fluorspar, gold, silver, zinc (ore processing)	Adrasman mining-beneficiation complex	Kanimansurskoye deposit	650,000
Boron	Yakarkharskoye deposit	Badakhshan region	NA
Cement	OAO Tajikcement	Dushanbe	1,000,000
Coal	UP Fon-Yagnob	Pyandzh region	50,000
Do.	Isfara hydrometallurgical plant	Isfara	300,000
Do.	OAO Anguisht	Shurab region	NA
Do.	Shurab brown coal deposit	do.	NA
Do.	SP Anzob	do.	NA
Copper-lead-zinc	Leninabad mining-beneficiation complex	Yuzhno-Yangikanskiy deposit	2,500
Dolomite	Yavan electrochemical complex	Pashkharvoskoye deposit	NA
Fluorspar, concentrate	Takob mining-beneficiation complex	Takob and Krasnye Kholmy deposits	60,000 ²

See footnotes at end of table.

TABLE 2—Continued
TAJKISTAN: STRUCTURE OF THE MINERAL INDUSTRY IN 2012¹

(Metric tons unless otherwise specified)

Commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity ^c
Gold, in ore	kilograms	Aprelevka joint venture	Aprelevka deposit	200
Do.	do.	Arteli Odina	NA	NA
Do.	do.	Darvaz joint venture	Yak-Suyskoye deposit, Khatlonskaya region	2,000
Do.	do.	OOO Takom Gold	NA	NA
Do.	do.	Tilloi Tochik	NA	NA
Do.	do.	Zerafshan Gold Co.	Jilau, Khirskhona, Olympiyskoye, and Taror deposits, Sughd Oblast'	2,500
Gold, ore processing	do.	Kansayskaya factory	Aprelevka, Burgunda, Kyzyl-Chek, and Shkol'noye deposits	165,000 ²
Do.	do.	Vostokredmet refinery	Qizfaquz	NA
Lead-zinc		Adrasman mining-beneficiation complex	NA	NA
Do.		Kansayskoye mining complex	Karamazor region	NA
Do.		Takaelyyskiy metallurgical complex	NA	NA
Limestone		Dushanbe cement complex	Kharangonskoye deposit	NA
Loam		do.	Varzobskoye Ushchel'ye deposit	NA
Marble		Dal'yan Bolo deposit	Ganchinskiy region	NA
Do.		Dashtak deposit	Darvaz region	NA
Do.		Jilikul deposit	Pendzhikentskiy region	NA
Mercury		Anzob mining-beneficiation complex	Dzhzhikrutskoye deposit	150
Natural gas and petroleum:				
Natural gas	thousand cubic meters	Sixteen oil-gas deposits under exploration, which include Ayritanskoye, Madaniyatskoye, and Ravatskoye	Fergana depression	200,000 ²
Petroleum		Beshtentyakskoye, Kichik-Belskoye, Shaambary, and Uzunkhorskoye deposits	Southern Tajik depression	200,000 ²
Salt		Ashtskiy plant	Kamyshkurganskoye deposit	NA
Do.		Khoja-Sartez, Samanchi, and Tanabchi deposits	NA	NA
Do.		Voseyskiy plant	Khodzha-Muminskoye deposit	NA
Do.		Yavan electrochemical complex	Tut-Bulakskoye deposit	NA
Silver	kilograms	Zerafshan Gold Co.	Jilau and Taror deposits, Sughd Oblast'	NA
Do.	do.	Aprelevka joint venture	Aprelevka deposit	NA
Do.	do.	Nukrafon Co.	Soghd region	NA
Strontium, ore		Chaltash, Chilkutan, and Davgir deposits	Khatlon region	180,000
Tin-tungsten		Tafkon deposit	NA	NA
Tungsten ore		Maykhura deposit	Central Tajikistan	150,000

^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.