



2013 Minerals Yearbook

ALBANIA

THE MINERAL INDUSTRY OF ALBANIA

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Albania is a relatively small and mountainous country in the southwestern Balkan Peninsula and has been going through a transition to a free-market economy and a democratic political system. The country has significant mineral deposits of chromite, coal, copper, iron, and nickel along with high hydroelectric power potential. In 2013, Albania also produced cement, gypsum, limestone, natural gas, and petroleum. With the exception of chromite, in which it accounted for nearly 2% of world production, Albania was not a significant producer of mineral commodities on a world or regional scale (National Agency of Natural Resources, 2010b; Albania Energy Association, 2012; Papp, 2014).

Mineral extraction activity continued to expand in line with the overall growth trend in recent years, albeit at a subdued rate, with new exploration licenses granted and increased minerals investment and production. Albania made some progress on its national privatization program with the sale of four hydroelectric powerplants; however, the country also experienced a setback due to the canceled privatization of the state oil company, Albpetrol Sh.A, due to reported tender irregularities (European Bank for Reconstruction and Development, 2013; International Finance Corporation, 2013; Watson, 2013a).

Government Policies and Programs

The National Agency of Natural Resources (AKBN) and the Albanian Geological Survey (AGS) were the two Government agencies that were broadly responsible for the minerals industry in Albania. The AKBN, which was an agency within the Ministry of Energy and Industry (MEI), had three main functions. First, the agency designed and implemented official Government mining policies and regulations; second, it issued and revoked exploitation and development licenses in the country; and third, it monitored areas used or conserved during mining and postmining stages (National Agency of Natural Resources, 2010a). The AGS, on the other hand, was responsible for drafting and maintaining maps and databases of areas with mining-related activity. It also prepared geologic and geophysical surveys for regions of Albania and their minerals (Uruçi and Limaj, 2014).

The Mining Sector Law of 2010 was the principal law governing all mineral extraction activities in Albania. This law specified the classification of the minerals, types of permits issued, and terms and conditions that apply to each type of permit. The law had abrogated the old Mining Sector Law of 1994 and harmonized Albanian legislation with the body of law of the European Union (EU) in accordance with EU Directive 2006/21/EC on the management of waste from extractive industries (European Union, 2006). The Licensing Law of 2009 defined the procedure for obtaining a mineral permit. Requests for mineral permits were subject to filing and notification to Albania's National Licensing Center (NCL), which forwarded the files to the MEI after examination.

The MEI was responsible for making the final decision on mineral licenses (Uruçi and Fani, 2013).

In February 2013, Albania adopted the 2013 mining plan, and legislation on mining and hydrocarbons was further amended as part of the Government's efforts to harmonize its laws with the EU body of law in preparation for obtaining official EU candidate status in 2014. The Parliament approved a new law on concessions and public-private partnerships that applied to mining, natural gas distribution, and electricity generation and distribution among other areas. The new law replaced the 2006 law on concessions and established the framework for privately financed concessionary projects by distinguishing them from public-private partnerships. As well as aligning Albanian policy on concessionary contracts with EU legislation, the new mining policy sought to enhance transparency, efficiency, and long-term sustainability of infrastructure and public service projects (European Commission, 2013; National Agency of Natural Resources, 2014; U.S. Department of State, 2014).

In August 2013, Guidance No. 8/2 of the Ministry of Finance on "national taxes" was issued, establishing a new tax procedure for the mineral export sector. Accordingly, the possessor of the mineral exploitation permit was obliged to pay the mineral endowment tax at the time of the customs declaration. In October, Instruction No. 1 of the MEI on the "rules and review procedures of the application requests for building permits for energetic and mineral objects" was issued. The new instruction abrogated Instruction No. 1 of April 2012 and established a more specific procedure for the application and issuance of building permits in the minerals sector (European Bank for Reconstruction and Development, 2014, p. 2).

Minerals in the National Economy

In 2013, Albania's gross domestic product (GDP) increased by 1.4%, decelerating from a 2.4% growth rate in 2012. The nominal GDP in current dollars in 2013 was \$12.9 billion, which was slightly up from \$12.3 billion in 2012. The slowdown in production was widespread across all main economic sectors. Industry grew at a real rate of 7.9%, and construction activity increased by 1.1%. The extracting sector, which included mining and quarrying of both energy- and nonenergy-producing materials, grew by 10.5% compared with an unusual 21% growth in 2012, which had been mainly due to increased domestic production of electricity in response to increases in prices of imported energy (Institute of Statistics, 2014b; World Bank, The, 2013, p. 1; 2014a; 2014b, p. 1).

Within the extracting sector, mining and quarrying of energy-producing materials grew at a real rate of 14% in 2013, and mining and quarrying of nonenergy-producing materials grew at the lower rate of 5.7%. Within manufacturing, the manufacture of coke and refined petroleum products decreased by 59.7%, and the manufacture of base metals and fabricated

metal products, by 3%, whereas the manufacture of other nonmetallic mineral products increased by 0.1% (Institute of Statistics, 2014b).

In 2013, industrial production made up about 15% of the GDP, slightly up from 14% in 2012. The extracting sector made up 40% of the value of industrial production, up from 39% in the previous year, and accounted for about 6% of the GDP. Mining and quarrying of energy-producing materials accounted for 31% of industrial production, which was up from 30% in 2012, whereas mining and quarrying of nonenergy-producing materials accounted for only 9%, which was unchanged from the previous year (Institute of Statistics, 2014c).

Mineral products and base metals continued to be a significant source of export revenue for Albania's economy. Minerals were also the leading export and import goods of the country. Exports of mineral products continued to be the leading export category in terms of value. They grew by 31% to 97.1 million Albanian lek (ALL) (\$0.95 million¹), making up about 40% of total Albanian exports of ALL246.4 million (\$2.41 million) in 2013 ("mineral products" included industrial minerals, mineral fuels, and metal ores, but not processed metals). The value of exports of base metals and articles of base metals decreased by 10% to ALL35.1 million (\$0.34 million) and made up about 14% of total exports. Mineral products were also the leading import category and were valued at about ALL92.7 million (\$0.91 million), decreasing by 16% from 2012. They accounted for 18% of the total value of all Albanian imports. The value of imports of base metals and articles of base metals decreased by 8% to ALL50.1 million (\$0.49 million) and made up about 10% of total imports of ALL517.3 million (\$5.05 million) (Institute of Statistics, 2014a, p. 9, 23).

In 2013, Albania's exports to the United States were valued at \$22.8 million. Albanian exports included, in order of value, \$2.3 million in steelmaking materials. Albania's imports from the United States were valued at \$74.4 million. These imports included, in order of value, \$8.9 million in coal and other fuels, \$4.2 million in other chemicals, \$2.9 million in other petroleum products, \$122,000 in finished metal shapes, and \$87,000 in iron and steel products (U.S. Census Bureau, 2014a, b).

Production

The production of most minerals increased, with some showing increases of at least 15%. Among metals, the production of nickel ore increased by 187%; nickel content of ore, by 100%; chromite, by 39%; and rolled steel, by 26%. Among industrial minerals, gypsum output increased by 39%; clay, by 23%; and limestone, by 19%. Among mineral fuels and related materials, crude petroleum output increased by 17%, and bitumen, by 110%. On the other hand, coal output remained at zero. Silica sand production decreased by 96% (table 1).

Structure of the Mineral Industry

All major producers were foreign owned. The leading private production companies in the mineral industry were

¹Where necessary, values have been converted from Albanian lek (ALL) to U.S. dollars (US\$) at the rate of US\$1.00=ALL102.4 in 2013 according to information by the Bank of Albania.

AlbChrome Ltd. of Austria (chromite); Antea Cement Sh.A. of Italy (cement); Beralb Sh.A. (copper) and Kürüm International Sh.A. (lime and steel), both of Turkey; and Bankers Petroleum Ltd. (crude petroleum) and Stream Oil and Gas Ltd. (crude petroleum and natural gas), both of Canada.

The MEI invalidated the privatization of the state-owned oil firm Albpetrol Sh.A. in January after the winning consortium of Albania and the United States, Vetro Energy Pte. Ltd., failed to make the 20% deposit payment as required by the bid. The tender for the sale of Albpetrol Sh.A. had been won by Vetro Energy in October 2012. As of yearend 2013, the Government still planned to sell all Albpetrol Sh.A.'s aboveground assets, as well as its oil and gas exploration and exploitation rights for 25 years (Koleka, 2013a; Watson, 2013a).

In August, the majority ownership (85%) of the former state-owned oil refinery firm ARMO Sh.A. was transferred from an Albanian businessman to Heaney Assets Corp. of Azerbaijan. The Government of Albania continued to hold the remaining 15% of the company's shares (Likmeta, 2013; Popp and Loloci, 2014).

There was an increase in the number of investments in mineral exploration and extraction in the country. Through early 2014, 752 mining permits were issued by the MEI. Of these, 673 were exploitation permits. Chromite ore and limestone were the leading minerals of extraction, with 211 and 231 permits, respectively. Permits for other key minerals issued included 34 permits for iron-nickel and nickel-silicate deposits, 32 permits for clay, and 30 permits for sandstone (Uruçi and Limaj, 2014). Table 2 is a list of major mineral industry facilities.

Commodity Review

Metals

Chromium.—Chromite production capacity at AlbChrome Ltd.'s Bulqiza Mine, which was under new ownership, increased to 100,000 metric tons per year (t/yr) from 85,000 t/yr. In January, Balkan Finance Investment Group (Balfin) of Austria acquired 100% of AlbChrome from Austrian alloy producer DCM Deco Metal (Balkan Finance Investment Group, 2013a). The company planned to open a ninth shaft and to add six new levels to the Bulqiza Mine to reach more than 1.5 million metric tons (Mt) of new reserves, which would prolong the life of the mine (Balkan Finance Investment Group, 2013b). Balfin subsequently also announced investment into renewal of equipment at the Klos enrichment plant. Once enriched, Balfin planned to transfer chromite to the furnaces of the ferrochrome factory of Elbasan for melting (Balkan Finance Investment Group, 2013c).

Copper.—Ekin Maden Ticaret ve Sanayi A.Ş. (Ekin Maden) of Turkey reported that production capacity at the Munella Mine of its Albanian subsidiary Beralb Sh.A would rise to 365,000 t/yr of copper ore in the second half of 2013 from 300,000 t/yr in 2012 as a result of new capital investment (Beralb Sh.A., 2013). The processing capacity of the company's Fushe Arrez copper flotation plant was also increased to 600,000 t/yr, and the production capacity of copper concentrate rose to 50,000 t/yr (Ekin Maden Ticaret ve Sanayi A.Ş., 2013).

Gold.—In January, Tirez Resources Ltd. obtained six metals exploitation licenses from the MEI. The company announced that this would allow for exploitation of copper, gold, silver, and zinc in the Mirdita sulfide project area (Tirez Resources Ltd., 2013). In July, Arian Resources Corp. announced that its Albanian subsidiary JAB Resources SHPK obtained an exploration license from the NLC for its Kacinar gold project. The preliminary analysis of drill core and surface trench samples from the area had yielded 61 samples with grades greater than 1 gram per metric ton (g/t) gold, with 20 of these samples showing greater than 5 g/t gold (Arian Resources Corp., 2013).

Iron and Steel.—Kürüm International Sh.A. of Kürüm Holding of Turkey reported that capacity at Elbasan Steel Production Facilities increased to 700,000 t/yr in 2013 from 600,000 t/yr in 2012. Kürüm International, which was the sole steelmaker in Albania, achieved increases in capacity and, consequently, in production of both crude and rolled steel by acquiring four hydroelectric powerplants from the Government and turning the Elbasan facility into an integrated complex that generated its own energy (Kürüm Holding, 2014).

Kürüm International planned to resolve the problem of persistent domestic power shortages and to secure an independent power supply for its electric arc furnaces to melt scrap through energy generation by its own hydroelectric powerplants. The privatization of the four powerplants in February, two of which are located on the Mat River and two on the Bistrice River, was the only successful privatization carried out in Albania in 2013 (Koleka, 2013b). Kürüm International planned to increase steel output in the country by a further 20% in 2014 by generating more energy for use at its Elbasan steel plant (Koleka, 2013c).

Nickel.—The production of both nickel ore and nickel content increased significantly in 2013, but these were recoveries from steep decreases in production in 2012. The level of production was still lower than what it was in 2011. The precise reasons for this significant decrease and subsequent increase were unknown, although it could be attributed to FENI Industries' production and import strategy for its ferronickel plant in Kavadarci, Macedonia. Cunico Resources NV, which was the owner of FENI Industries, used nickel ore from the Bitincka, Guri, Nom, and Treni Mines in Albania at its ferronickel plant in Macedonia. The company reported that it blended Macedonian ore from the open pit mine at Rzanovo with higher grade ores imported from Albania, Indonesia, the Philippines, and Turkey in order to optimize ferronickel production (Cunico Resources NV, 2013).

Mineral Fuels and Other Sources of Energy

Albania's primary energy supply sources were crude petroleum and petroleum products (56%) and hydroelectric power (16%). Natural gas represented only 0.6% of total energy supply. Although the country held the Patos-Marinza heavy oil field in the south, which was the largest onshore oilfields in Europe by reserves, Albania was dependent on energy imports for about 50% of its energy needs (Honoré, 2014, p. 76; Popp and Loloci, 2014; Bankers Petroleum Ltd., 2015).

Natural Gas and Petroleum.—Total crude oil production in the country was estimated to have increased owing to increased production by Bankers Petroleum Ltd. of Canada, which was partially offset by decreased production by Stream Oil and Gas Ltd. of Canada. In 2013, Bankers Petroleum Ltd. reported that it produced 18,169 barrels per day (bbl/d), which was a 21% increase compared with 2012. In fiscal year 2013 (which ran from December 2012 through November 2013—the latest time period for which data were available), Stream Oil and Gas Ltd. reported that it produced 1,009 bbl/d compared with 1,019 bbl/d in fiscal year 2012. The Government-owned Albpetrol Sh.A. may have had some unreported crude petroleum production, but it was thought that its active production facilities were operated by Bankers Petroleum or Stream Oil and Gas through production-sharing agreements (Bankers Petroleum Ltd., 2014; Stream Oil and Gas Ltd., 2014).

In November, Royal Dutch Shell plc. of the United Kingdom and Petromanas Energy Inc. of Canada announced positive results from their joint oil and natural gas exploration in Berat (Mbreshtan) in southern Albania. Their well was projected to have a 800- to 1,300-bbl/d light oil capacity when it came online (Royal Dutch Shell plc., 2013).

Renewable Energy.—The hydroelectric power sector accounted for about 98% of Albania's domestic electricity production. As of yearend 2013, 36 hydroelectric powerplants were in construction out of 220 medium- and large-size hydroelectric powerplants that had been approved for construction before 2011. Hydroelectric powerplants currently in operation used only an estimated 35% of the country's hydroelectric power capacity (Popp and Loloci, 2014).

In December, Enso Hydro of Austria announced that it began the construction of a hydroelectric powerplant in Lengarica in southeastern Albania with a capacity of more than 9 megawatts. The average annual power production at the Lengarica plant was projected to reach about 32 gigawatthours, which would be enough to provide electricity to about 10,000 households (Byalkova, 2013).

Outlook

Albania has the potential to increase its production of metals and mineral fuels as well as its hydroelectric power generation as exploration projects continue to yield viable results and as foreign companies increase their investments in the country. In particular, recent capacity enhancements in copper, chromite, and steel production facilities are likely to further increase output for these three minerals in 2014. The exploration for precious metals, such as gold, is at an early stage but may move into the extraction phase in the medium term. The discovery of crude petroleum and natural gas resources by Shell and Petromanas in southern Albania is expected to generate greater interest in the country's hydrocarbon reserves by foreign energy companies. Increased exploration activity in hydrocarbons may thus materialize in coming years, both onshore and in Albania's territorial zone in the Adriatic Sea, which have yet to be explored for natural resources. Domestic energy production through hydroelectric power sources is expected to see substantial growth as more hydroelectric powerplants are built

and come online (Robinson and Koleka, 2013; Popp and Loloci, 2014).

Further investment in the Albanian minerals industry, however, depends on the economic and political stability of the country, the success of privatization efforts through enhanced transparency, improvement of infrastructure, and adequate power generation. The EU was expected to grant candidate status to Albania in 2014, which should help the country make further progress in establishing a sound, functioning legal framework for privatization of and increased investment into state-owned enterprises, including those in the minerals and energy sectors. On the other hand, the planned review of all previously issued concessions by the newly elected Government may introduce uncertainty for current license and permit holders in the country and slow down mineral exploration and extraction activity in Albania. The foreign investment promotion and protection agreement (FIPA) signed with Canada in November is expected to result in more exploration activity by Canadian mining and energy companies in the country (Foreign Affairs, Trade and Development Canada, 2013; Watson, 2013b; European Commission, 2014).

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TABLE 1
ALBANIA: PRODUCTION OF MINERAL COMMODITIES¹

(Metric tons unless otherwise specified)

| Commodity ² | 2009 | 2010 | 2011 | 2012 | 2013 ³ |
|---|---------------------|----------------------|------------------------|------------------------|---------------------|
| METALS | | | | | |
| Chromite, gross weight (18% to 42% Cr ₂ O ₃) | 283,558 | 328,322 | 330,938 | 380,349 ^r | 529,592 |
| Copper: | | | | | |
| Ore, gross weight | 114,286 | 139,926 | 305,284 | 479,720 ^r | 507,105 |
| Cu content of ore (1.45% average) ^e | 1,700 ^r | 2,000 ^r | 4,400 ^r | 7,000 ^r | 7,400 |
| Iron and steel: | | | | | |
| Metal, ferroalloys, ferrochromium | 7,556 | 23,233 | 28,694 | 24,018 ^r | 24,692 |
| Steel: | | | | | |
| Crude steel, secondary | 440,000 | 390,000 ^e | 463,620 | 381,692 ^r | 401,432 |
| Rolled steel | 216,000 | 235,882 | 295,333 | 248,327 ^r | 312,527 |
| Nickel, ore: | | | | | |
| Iron-nickel and nickel-silicate ores | 68,840 | 269,300 | 270,000 ^e | 75,017 ^r | 215,086 |
| Ni content of ores ^e | 1,000 | 3,000 | 3,000 | 1,000 ^r | 2,000 |
| INDUSTRIAL MINERALS | | | | | |
| Cement, hydraulic | 1,110 | 1,300 | 1,800 | 1,800 ^r | 1,800 |
| Clay, kaolin | 796 | 795 | 974 | 961 ^r | 1,181 |
| Gypsum | 71,276 | 77,400 | 80,000 ^e | 91,021 ^r | 126,399 |
| Lime | 25,000 | 46,039 ^r | 43,620 ^r | 23,096 ^r | 23,007 |
| Limestone | 3,271,617 | 2,363,445 | 2,400,000 ^e | 2,727,451 ^r | 3,257,513 |
| Silica sand ^e | 12,000 | 12,000 | 12,000 | 3,600 ^r | 150 |
| MINERAL FUELS AND RELATED MATERIALS | | | | | |
| Coal, lignite | 2,000 | 2,500 | 1,200 | -- ^r | -- |
| Gas, natural, gross production | 8,000 ^r | 13,000 ^r | 15,000 ^r | 17,500 ^r | 18,300 |
| Petroleum: | | | | | |
| Crude | 3,798 ^r | 4,899 ^r | 5,895 ^r | 6,787 ^r | 7,937 |
| Refinery products: | | | | | |
| Bitumen | 80,000 ^e | 32,600 | 44,000 | 80,728 ^r | 169,800 |
| Coke ^e | 72,000 ^r | 16,000 ^r | 62,000 ^r | 15,000 ^r | 10,000 ^e |
| Residual fuels | 837 ^r | 376 ^r | 560 ^r | 132 ^r | 100 ^e |

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

¹Table includes data available through July 11, 2014.

²In addition to the commodities listed, a variety of industrial minerals and construction materials (common clay, dolomite, olivine, salt, sand and gravel, and stone) are thought to have been produced, but output is not reported quantitatively, and available information is inadequate to make reliable estimates of output. Also, a small amount of bauxite may have been produced.

³Reported figure.

TABLE 2
ALBANIA: STRUCTURE OF THE MINERAL INDUSTRY IN 2013

(Thousand metric tons unless otherwise specified)

| Commodity | Major operating companies | Location of main facilities | Annual capacity ^e | |
|---------------|--|---|---|-----------------|
| Cement | Fushe Kruje Cement Factory, Sh.p.k. (Seament Holding) | Fushe Kruje, 35 kilometers north of Tirana | 1,330 | |
| Do. | Elbasan Cement Factory (Seament Holding) | Elbasan, 32 kilometers southeast of Tirana | 775 | |
| Do. | Antea Cement Sh.A. (Titan Cement S.A.) | Kruje, 35 kilometers north of Tirana | 1,500 | |
| Do. | Colacem Albania Sh.p.k. (Colacem S.p.A.) | Balldre, northwestern Albania | NA | |
| Chromite | AlbChrome Ltd. (ACR) (Balkan Finance Investment Group, 100%) | Mine in Bulqiza, 40 kilometers northwest of Tirana | 100 | |
| Do. | do. | Pogradec (including Katjtel and Pojske Mines) | NA | |
| Do. | Numerous small producers | Mostly concentrated near Bulquize | NA | |
| Copper: | | | | |
| Mine | Beralb Sh.a. (Ekin Maden Ticaret ve Sanayi A.Ş.) | Munella Mine, 25 kilometers from Fushe-Arrez | 365 | |
| Do. | do. | Lakrosh Mine, 14 kilometers from Fushe-Arrez | 150 | |
| Concentrate | do. | Fushe-Arrez Flotation Plant | 50 | |
| Ferrochromium | Albanian Chrome Sh.p.k. (ACR) (Balfin, 100%) | Elbasan, 32 kilometers southeast of Tirana | 33 | |
| Lime | Kürüm International Sh.A. (Kürüm Holding, 100%) | Elbasan | 72 | |
| Natural gas | million cubic meters | Albpetrol Sh.a. (Government owned) | Gasfields in southwestern Albania | NA |
| Do. | do. | Stream Oil and Gas Ltd. | Delvina gasfield in southern Albania | NA ¹ |
| Petroleum: | | | | |
| Crude | 42-gallon barrels per day | do. | Ballsh-Hekal, Cakran-Mollaj, and Gorischt-Kocul oilfields in southwestern Albania | 1,600 |
| Do. | do. | Bankers Petroleum Ltd. | Oilfields at Kucova and Patos Marinza, east of Fier in south-central Albania | 18,500 |
| Refined | do. | Albanian Refining and Marketing Organization Sh.a. (ARMO) (Anika Enterprises, 85%, and Government, 15%) | Refineries at Ballsh and Fier | 30,100 |
| Steel | | Kürüm International Sh.A. (Kürüm Holding, 100%) | Electric arc furnace plant at Elbasan | 700 |

^eEstimated. Do., do. Ditto. NA Not available.

¹Stream Oil and Gas Ltd. did not produce any natural gas in 2013.