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The Mineral Industry of Georgia

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Prior to the proclamation of Georgia's independence in 1991, a range of mineral commodities were mined in Georgia, including arsenic, barite, bentonite, coal, copper, diatomite, lead, manganese, zeolites, and zinc. The country's metallurgical sector produced ferroalloys and steel. Production of many of these mineral commodities ceased or had been significantly reduced since 1991 because many supply chains were severed after the disintegration of the Soviet Union.

In the middle of the past decade, the Government of Georgia sought to position the country as a transit hub between Europe and Asia. As a result, the country emphasized making improvements to its transportation and energy infrastructure and logistics systems. In 2014, Georgia continued the modernization and partial construction of its East-West gas pipeline; several new gas network links were to be constructed. In particular, they included a 20-kilometer (km)-long Gori-Kareli link, a 23-km long Zestafoni-Kutaisi link, and a 76-km long Kutaisi-Senaki link. The $78 million project was funded in 2010 by the U.S. Agency for International Development (USAID) and was aimed at increasing energy security in the country. The project was directed by the Ministry of Energy and Natural Resources, Georgia Oil and Gas Corp. (GOGC), and USAID (Bizzone.info, 2014b).

In 2008, the State Oil Company of Azerbaijan Republic (SOCAR) opened a new Kulevi Oil Terminal with the capacity to move 10 million metric tons per year (Mt/yr) of petroleum products, which was to be expanded to 20 Mt/yr in the future. The terminal was able to load and unload 100,000-ton tankers, and its initial reservoir park had a capacity of 320,000 cubic meters. Since 2008, the terminal had continuously expanded its functionality and capacity—the terminal started transshipments of crude petroleum in 2010; it first received compressed natural gas in 2012; and SOCAR was planning to construct a new reservoir park, in 2015, which would include 5 reservoirs with a total capacity of 70,000 cubic meters as well as a rail terminal capable of loading and unloading 26 railway tankers simultaneously (Gasanov, 2008; BlackSeaNews.net, 2012; 2015; Salaeva, 2015).

In 2007, the Government decided to stop importing natural gas from Russia and to import most of its natural gas from Azerbaijan. In 2013, members of the new Government thought that reliance on a single source for such an important energy product could be risky, and they were developing some alternative sources of natural gas. The options included obtaining natural gas from Kazakhstan, Turkmenistan, and, possibly, Iran with the goal of supply diversification. The Government even considered the possibility of purchasing gas from Russia. As of 2014, however, the country continued to import natural gas solely from Azerbaijan (Kikaleishvili, 2013).

In October, a new hydropowerplant, which is located on the Paravani River at the border with Turkey, started operations. The powerplant was built by Georgian Urban Energy LLC (a subsidiary of the Anadolu Group of Turkey) and cost the company $200 million to build. With a total capacity of 87 megawatts (MW), the new powerplant was the largest among all powerplants built in the country in the past 35 years. The company expected that the energy produced at the Paravani powerplant would be consumed domestically during the winter, and it would be exported to Turkey in the summer (AFN.by, 2014).

Minerals in the National Economy

In 2014, the nominal gross domestic product (GDP) of Georgia increased by 2.4% to $16.5 billion[1] compared with that of 2013. The country's real GDP increased by 4.8% in 2014 compared with that of 2013. The share of industrial production in the GDP in 2014 was 17.1%, and mining and quarrying accounted for 4.1% of the value of industrial production. In 2014, the real value of production in mining and quarrying increased by 1.8%, whereas the real value of manufacturing production increased by 3.9%, indicating that Georgia's economy was growing after the economic reforms of the previous decade, but that the mining sector continued to lag other sectors of the economy (National Statistics Office of Georgia, 2015c; U.S. Central Intelligence Agency, 2015).

In 2014, foreign direct investment (FDI) increased by 35% to $1,272 million from $942 million in 2013, and the share of reinvestments in total FDI was 21%. The Netherlands was the leading investor in Georgia (having provided 26% of the total FDI in 2014), followed by Azerbaijan (24%), China (15%), the United Kingdom (9%), Luxembourg (7%), the United States (6%), and Turkey and Russia (5% each). In 2014, the FDI in the energy sector was $99 million, or 8% of the total, and that in the mining sector was $48 million, or 4% of the total; compared with the FDI in 2013, this was a 60% decrease for the energy sector and a 9% increase for the mining sector (National Statistics Office of Georgia, 2015b).

Government Policies and Programs

In 2014, the Georgian National Regulatory Commission on Energy and Water (GNERC) developed a new methodology for computing natural gas rates. The new methodology was to comply with the new Law on Natural Gas and Electric Energy, and was to bring energy price formation in line with the economic principles of utility regulation and with existing international practice. The underlying principle of the new methodology was "cost plus," which would establish a fare rate that would protect consumers and ensure highquality standards and the stability of utility companies. The new rates were expected to go into effect in January 2015 (Nor.ge, 2015).

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[1]Where necessary, values have been converted from Georgian laris (GEL) to U.S. dollars (US$) at an annual average exchange rate of GEL1.766=US$1.00 for 2014 and GEL1.655=US$1.00 for 2013.

Starting in November 2014, the natural gas network hookup fee for residential users was reduced to 400 laris ($229) from 600 laris ($343). As before, the customers were able to spread out the payment over a period of 16 months. The Ministry of Energy planned to provide natural gas hookups for 86,000 households in 2014. The actual work of providing access to the natural gas network was done by SOCAR Georgia Gas, which was a subsidiary of SOCAR Energy Georgia (Lomidze, 2014a).

Production

About one-half of the 2014 production data in table 1 were estimated because data for many mineral commodities were not available. Production of natural gas increased by 85% and that of nitrogen increased by an estimated 6.7%. At the same time, production of gold decreased by an estimated 40%; that of crude oil, by 27.5%; coal, by 21.0%, steel rebar, by 10%; silver, by an estimated 9.1%; and salt, by an estimated 6.7%. These and other production data are in table 1.

Structure of the Mineral Industry

Table 2 is a list of enterprises engaged in mineral production.

Mineral Trade

In 2014, Georgia ran a substantial trade deficit—the total value of its exports ($2.86 billion) was greatly exceeded by the total value of its imports ($8.60 billion). The country's major export trade partners were, in descending order of value, Azerbaijan (which received 19.0% of Georgia's exports), Armenia (10.1%), Russia (9.6%), Turkey (8.4%), the United States (7.3%), Bulgaria (5.7%), Ukraine (4.9%), China (3.2%), Kazakhstan (3.1%), and Italy (3.0%). Its major import trade partners were, in descending order of value, Turkey (which supplied 20.1% of Georgia's imports), China (8.5%), Azerbaijan (7.4%), Russia (6.7%), Ukraine (6.4%), Germany (5.4%), Japan (4.3%), Romania (3.6%), the United States (3.3%), and Italy (2.6%). Mineral commodities, especially metals, played a significant role in the country's exports. Ferroalloys accounted for 10.0% of the country's total export value; copper ores and concentrates, 8.7%; nitrogenous minerals or chemical fertilizers, 4.8%; and bars and rods of iron, 2.2%. Among the country's imports, the largest category was refined petroleum and petroleum oils, which made up 10.7% of the total. Petroleum gases contributed another 4.3% and copper ores and concentrates, 1.9% (National Statistics Office of Georgia, 2015a).

Commodity Review

Metals

Copper and Gold.—In 2012, GeoProMining, Ltd. (GPM) of Russia had sold both of its Georgian holdings—JSC Madneuli and Quartzite Ltd.—to Rich Metals Group (RMG) of Russia for a total of $120 million. The new owner renamed the two companies RMG Copper (formerly JSC Madneuli) and RMG Gold (formerly Quartzite Ltd.). In February 2012, the Ministry of Energy and Natural Resources conducted an auction for the right to mine ore deposits in Sakdrisi, Bolnisi region. As a result of the auction, RMG obtained the license to mine the deposit (Apsny.ge, 2012a, b).

Eight years earlier, in 2004, Georgian and German archeologists discovered one of the oldest gold mines in the world, which is thought to be about 5,000 years old. Subsequently, in 2006, the mine was awarded the status of an archeological cultural heritage monument. In October 2013, however, the Government annulled the status of the archeological cultural heritage monument and declared that the status was awarded illegally. Some members of the public disagreed with the October 2013 decision and appealed the decision. In June 2014, the Tbilisi City Court decided to order RMG Gold to halt mining operations in Sakdrisi until the final court decision. The Court argued that mining activities could permanently damage the old mine and destroy its archaeological value. In December, the Ministry of Culture and the National Agency for Protection of Cultural Heritage issued decrees that removed the status of cultural heritage from the Sakdrisi Mine, but the mine retained the status of an archaeological object. At the same time, the Government decided to support the RMG workers and to grant permission to continue mining in the area. The Government stated that the RMG promised to build an archaeological museum that would preserve all objects that might be found on the site (Apsny.ge, 2014a; EurasiaNet.org, 2014; Israelyan, 2015).

Iron and Steel.—In 2014, Georgia had four steel plants, all of which specialized in the production of steel reinforcing products (mostly rebar) from metal scrap. The Rustavi metallurgical plant, which was built in 1940, was the oldest plant. In addition to rebar, it produced pig iron, seamless pipes, ferroalloys, and other finished steel products. GeoSteel LLC, which was also located in the city of Rustavi, was a joint venture between JSW of India and Georgian Steel Holding Group of Georgia. As of yearend 2014, GeoSteel was the largest steel plant in Georgia and had capacity capacity to produce 175,000 metric tons per year (t/yr) of steel. GeoSteel specialized in the production of thermomechanically treated construction steel rebar, and its products were used to construct bridges, multistory buildings, and hydropower plants. The Kutaisi metallurgical plant, which was built in 2008, was a joint venture with OOO Eurasia Steel of India and had a design production capacity of 100,000 t/yr of rebar. Finally, Moulds and Metals Georgia Ltd. metallurgical plant in Poti was built in 2012 at a cost of $12,000. The company was planning to expand the plant in the next few years at a cost of $35 million. At design capacity, the plant was expected to employ a total of 220 people (SteelOrbis.com, 2010; EkhoKavkaza.com, 2012; Deloros.ru, 2014).

Over the past several years, the Rustavi steel plant was in the midst of an ownership dispute. After the death of the previous owner of the plant in 2008, according to the decision of the Tbilisi City court, the plant's ownership was transferred to AO Georgian Steel instead of the family of the deceased, which inherited OOO Rustavi Steel. Later, multiple courts made several more decisions about the ownership of the plant, and the plant's ownership was moving between Georgian Steel and Rustavi Steel. In February 2014, the Tbilisi City court seized all the plant's assets, including raw materials and inventories of finished products, until the plant paid off its debt of $4,500 laris (about $2,600). As a result, the Rustavi steel plant essentially had to halt its operations and the workers were to be placed on unpaid leave. By yearend, it was still not clear if and when the plant would be able to resume operations (Bizzone.info, 2013; Gazeta.ru, 2013; GeorgianPress.ru, 2015; Kmuzov, 2015; Transparency.ge, 2015).

Industrial Minerals

Cement.—As of the beginning of 2014, HeidelbergCement AG owned three cement plants and four concrete plants in Georgia. The three cement plants had a production capacity of 2 Mt/yr of cement. In October 2013, HeidelbergCement started a modernization project at its Rustavi plant. The major part of modernization was the installation of a new separator that would improve the quality of cement and expand the variety of products. In particular, the new separator would allow the plant to produce cement for construction and infrastructure elements that require special stability; previously, Georgia's cement plants did not have the equipment to produce cement with such characteristics. The company invested a total of about 4 million laris ($2.3 million) and completed construction in May 2014. HeidelbergCement also planned to modernize its cement plant in Kaspi and to build a new plant in Poti in the near future (Lomidze, 2014c; VestnikKavkaza.ru, 2014).

In April, Leader Cement LLC of Georgia and LaFarge S.A. of France announced their plan to build a new cement plant in the port city of Poti, which would cover an area of 40,000 square meters, would have the capacity to produce 250,000 t/yr of cement, and would employ 50 people. The first stage of construction would cost $10 million; the companies did not disclose when the construction was to be completed (Apsny.ge, 2014b; Concrete-union.ru, 2014; Lomidze, 2014b).

Mineral Fuels

Petroleum and Natural Gas.—In 2014, Georgia produced 41,334 t (300,500 barrels) of crude petroleum and exported all of it because the country did not have an operational oil refinery. As of yearend 2014, Georgia had about 1,500 petroleum deposits of various sizes; however, only 14 of them were producing crude oil. Five companies were engaged in oil production in Georgia, including three foreign companies—Black Oil and Gas of the United Kingdom, Frontera Eastern Georgia of the United States, and Jindal Petroleum Ltd. of India. The domestic companies producing petroleum were Georgian Oil and Gas Corp. (GOGC) and VP Georgia LLC (Bizzone.info, 2014a; Apsny.ge, 2015).

The country was divided into 25 petroleum licensing blocks. Since 1996, Georgia issued exploration licenses to 18 companies. In particular, Anadarko Petroleum Corp. of the United States explored Georgia's sea shelf and found several large deposits. The discoveries, however, did not lead to development because at the time the projects were considered too risky. As of yearend 2014, there was no oil exploration or production from the Georgia sea shelf, but the Government planned to hold new tenders in 2015 (Apsny.ge, 2015).

In June, Frontera Resources Corp. of the United States started natural gas production at the Mtsare Khevi deposit, which was located close to the village of Iormuganlo in the Sagarejo region of eastern Georgia. The company had a 25-year license for oil and gas production in Block 12, which covered an area of 5,000 square kilometers. The company had been working in Georgia since 1997 and had formed a joint venture, Frontera Eastern Georgia, with AO Gruzneft. Since then, Frontera reexplored several deposits, including the Baida, Mirzani, Muare Khevi, Nazarlebi, Patara Shiraki, and Taribana deposits. The development of the Mtsare Khevi deposit started in 2011, and Frontera invested about $400 million into the project. The deposit's resources were estimated to be 42 billion cubic meters of natural gas, and the company expected to produce about 75,000 cubic meters per day of natural gas (Interfax.ru, 2014; Neftegaz.ru, 2014; Frontera Resources, 2015).

Outlook

During the past decade, the Government of Georgia significantly improved the business climate in the country and continued positioning Georgia as a transit hub for hydrocarbons and other goods. The mineral sector, however, was unable to take full advantage of those changes. In the next 3 to 5 years, the mineral industry of Georgia is expected to have moderate but stable growth. Copper, ferroalloys, manganese, and steel are likely to remain the dominant mineral commodities in the short and medium terms. At the same time, a potential increase in domestic energy production could serve as a catalyst for faster future growth.

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TABLE 1
GEORGIA: PRODUCTION OF MINERAL COMMODITIES[1]

(Metric tons unless otherwise specified)

Commodity[2]		2010	2011[e]	2012[e]	2013[e]	2014[e]
METALS						
Copper, mine output, Cu content of concentrate		6,700	6,300	7,400	5,000	5,000
Gold	kilograms	5,000	7,000	3,900 [3]	4,300 [3]	2,600 [e]
Iron and steel:						
Ferroalloys, electric furnace:						
Ferromanganese		824	195	--	--	-- [3]
Silicomanganese		203,464	242,746 [3]	261,075 [3]	253,361 [r, 3]	256,677 [3]
Total		204,288	242,941 [3]	261,075 [3]	253,361 [r, 3]	256,677 [3]
Steel, rebar		200,000	200,000 [3]	220,132 [3]	188,737 [r, 3]	169,766 [3]
Manganese ore:[e]						
Gross weight		400,000	400,000	380,000	380,000	380,000
Mn content		116,000	116,000	110,000	110,000	110,000
Silver	kilograms	1,200	1,700	1,000	1,100	1,000
INDUSTRIAL MINERALS						
Cement		856,880	1,501,972 [r, 3]	1,545,546 [r, 3]	1,618,723 [r, 3]	1,626,198 [3]
Clays, bentonite[e]		5,000	4,800	4,900	5,000	5,000
Gypsum[e]		120	125	130	130	135
Nitrogen, N content of ammonia		150,000	145,000	150,000	150,000	160,000
Salt		30,000	28,000	29,000	30,000	28,000
MINERAL FUELS AND RELATED MATERIALS						
Coal, bituminous		240,628 [3]	352,872 [r, 3]	421,755 [r, 3]	371,847 [r, 3]	293,955 [3]
Natural gas	thousand cubic meters	7,900	5,800 [r, 3]	5,400 [3]	5,400 [3]	10,000 [3]
Petroleum, crude:						
In gravimetric units		51,050	48,942 [r, 3]	44,061 [3]	56,995 [r, 3]	41,334 [3]
In volumetric units	42-gallon barrels	371,000	355,800 [r, 3]	320,000 [3]	414,400 [r, 3]	300,500 [3]

[e]Estimated; data are rounded to no more than three significant digits; may not add to totals shown. [r]Revised. -- Zero.

[1]Table includes data available through July 15, 2015.

[2]In addition to the commodities listed, Georgia may have produced arsenic, barite, diatomite, iron ore, lead, perlite, petroleum refinery products, zeolites, and zinc, but available information was inadequate to make reliable estimates of output.

[3]Reported figure.

TABLE 2
GEORGIA: STRUCTURE OF THE MINERAL INDUSTRY IN 2014

(Metric tons unless otherwise specified)

Commodity	Major operating companies and major equity owners[1]	Location or deposit names[1]	Annual capacity[e]
Arsenic:	Includes:	Of which:	2,000 [2]
As content of ore	Racha mining and chemical plant	Lukhumi Mine, Ambrolauri region	
	Tsana mining and chemical plant	Tsana Mine, Lentekhi region	
Metal and compounds	Racha mining and chemical plant	Racha region	
	Tsana mining and chemical plant	Tsana region	
Barite	NA	Chordskoye deposit, Onis Raioni	70,000
Do.	RMG Copper (Rich Metals Group)	Madneuli Mine	NA
Barite-zinc ore	NA	Kvaisi Mine	NA
Bentonite	Includes:	Of which:	200,000 [2]
	Askana LLC (Silver & Baryte Ores Mining Co., 97.7%)	Askanskoye Mine, Ozurget'i	
	NA	Gumbrskoye Mine, Gumbra region	
Cement	LLC Kartuli Cementi (LLC HeidelbergCement Caucasus Shared Services, 70%)	Rustavi	1,500,000
Do.	LLC Saq Cementi (LLC HeidelbergCement Caucasus Shared Services, 75%)	Kaspi and Rustavi	500,000

See footnotes at end of table.

TABLE 2—Continued
GEORGIA: STRUCTURE OF THE MINERAL INDUSTRY IN 2014

(Metric tons unless otherwise specified)

Commodity	Major operating companies and major equity owners[1]	Location or deposit names[1]	Annual capacity[e]
Coal	Saqnakhshiri Ltd.	Akhaltsikhe, Tkibuli-Shaorskoye, and Tkvarchelskoye deposits in Akhalts'ikhis Raioni, Tkibuli, and Tqvarch'eli regions	300,000 [2]
Copper-gold ore	RMG Copper (Rich Metals Group)	Sakdrisi deposit, Bolnisi region	12,000
Diatomite	NA	Kisatibskoye deposit, K'isat'ibi region	150,000
Ferroalloys:			
Ferromanganese	RMG Copper (Rich Metals Group)	Zestafoni ferroalloys plant, Zestap'onis Raioni	400,000
Silicomanganese	do.	do.	250,000
Manganese sinter	do.	do.	250,000
Gold	RMG Gold (Rich Metals Group)	Madneuli Mine	NA
Iron and steel, steel, rebar	Kutaisi metallurgical plant (OOO Eurasian Steel)	Kutaisi	100,000
Do.	Rustavi metallurgical plant (Georgian Steel Holding Group, 100%)	Rustavi	125,000
Do.	Geosteel LLC (JSW Steel Ltd., 51%, and Georgian Steel Holding Group, 49%)	do.	175,000
Do.	Moulds and Metals Georgia Ltd.	Poti	NA
Manganese ore	Chiaturamanganumi enterprise of Georgian Manganese Holding Limited LLC (Georgian American Alloys, Inc.)	Chiatura Mine	500,000
Nitrogen	JSC Azoti chemical plant (Agrochem S.A, 100%)	Rustavi	330,000
Petroleum:			
Crude	Saknavtobi Oil and Gas Co. and most Georgian petroleum companies in joint ventures with Frontera Resources, Ioris Valley Oil & Gas Ltd., Ninotsminda Oil Co. Ltd., Black Oil and Gas of United Kingsom, Anadarko Petroleum Corp. of Canada, Jindal Petroleum Ltd. of India, and GeoGeroil	About 60 wells that account for 98% of output in Mirzaani, Sup'sa, and Zemo T'elet'i regions	200,000 [2]
Do.	Canagro Ltd.	Sagarejo, eastern Georgia	NA

[e]Estimated; estimated data are rounded to no more than three significant digits. Do., do. Ditto. NA Not available.

[1]Many 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 names of locations.

[2]Capacity estimate is the total for all enterprises that could produce the commodity.