2014 Minerals Yearbook

KUWAIT

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The Mineral Industry of Kuwait

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In 2014, Kuwait's economy was dominated by the production and refining of petroleum. Kuwait's proven crude oil reserves were estimated at 101.5 billion barrels and accounted for about 6% of the world's total. Kuwait was the world's seventh-ranked crude oil producer and its output averaged about 2.9 million barrels per day (Mbbl/d). By yearend 2014, Kuwait's proved natural gas reserves were estimated at about 1.8 trillion cubic meters and accounted for 1% of the world's total. Crude oil exports accounted for about 94% of Kuwait's total exports value and about 91% of the Government's total revenue in 2014. Kuwait produced modest quantities of other mineral commodities, such as cement, iron and steel, lime, natural gas, nitrogen fertilizer, refined petroleum products, salt, and sulfur (table 1; U.S. Energy Information Administration, 2014; BP p.l.c., 2015, p. 6, 8, 20, 22; Central Bank of Kuwait, 2015, tables 26, 35; Kuwait Government Online, 2015; Organization of the Petroleum Exporting Countries, 2015, p. 8, 22, 27–28, 52).

Kuwait's real gross domestic product (GDP) increased by 1.3% in 2014 compared with 1.5% in 2013. The oil sector accounted for 57.0% of the GDP in 2014 compared with 58.5% in 2013 (International Monetary Fund, 2014; 2015, p. 175).

The value of Kuwait's total exports decreased by about 5% to about $101 billion[1] in 2014 from about $116 billion in 2013. The value of Kuwait's total imports increased by about 7% in 2014 to about $31 billion from a revised value of $29 billion in 2013. The country's crude oil exports value decreased to about $98 billion in 2014 from about $105 billion in 2013. Kuwait's decrease in total exports value was attributable to a price decline of exported crude oil by about 9% to an average price of $95.32 per barrel in 2014 from an average of $105.04 per barrel in 2013 (Central Bank of Kuwait, 2015, table 35; Organization of the Petroleum Exporting Countries, 2015, p. 82).

In terms of value, Kuwait's exports to the United States decreased by about 10% to $11.4 billion in 2014 from $12.6 billion in 2013. Kuwait's crude oil exports to the United States, which accounted for 96% of the value of all Kuwait's exports to the United States, decreased to $11.0 billion in 2014 from about $12.3 billion in 2013. Kuwait's chemical fertilizer exports decreased in value by 25% to about $111 million in 2014 from $148 million in 2013. Kuwait's imports from the United States increased in value by about 38% to $3.6 billion in 2014, from about $2.6 billion in 2013. Kuwait's iron and steel products imports from the United States increased in value by about 31% in 2014 compared with that of 2013 owing to an increase in demand by the construction sector (U.S. Census Bureau, 2015a, b).

Government Policies and Programs

Law No. 116 for 2013—Regarding the Promotion of Direct Investment in the State of Kuwait, was first published in the Official Gazette on June 16, 2013, and was enacted in December 2013. The law contains 48 articles and targets the development and improvement of investment regulations in Kuwait. Article two of the law emphasizes the creation of the Kuwait Direct Investment Promotion Authority (KDIPA), which is the Government body responsible for setting and implementing investment policies and regulations. Article three of the law states the importance of foreign direct investment in Kuwait and emphasizes the use of modern technologies in the country. Article 15 of the law requires KDIPA to make a decision regarding a complete investment licensing application within 30 days from the date of submission. Article 22 of the law reserves foreign investors' rights to transfer monetary profits abroad, including employees' entitlements and savings. The executive regulations to implement the law were about 80% completed by yearend 2014 (O'Sullivan, 2013; Wilkinson, 2014; Kuwait Direct Investment Promotion Authority, 2015, p. 4, 8, 9, 13).

Production

Data on mineral commodities production are in table 1.

Structure of the Mineral Industry

Kuwait Petroleum Corp. (KPC), the Ministry of Oil, and the Supreme Petroleum Council are the Government organizations that are responsible for the petroleum sector in Kuwait. KPC subsidiaries included Kuwait Oil Co. K.S.C. (KOC), which managed the country's crude oil and natural gas operations; Kuwait Gulf Oil Co., which managed primarily offshore crude oil and natural gas operations in the Partitioned Neutral Zone between Kuwait and Saudi Arabia (which also is known as the Divided Zone); Petrochemical Industries Co. K.S.C., which dominated Kuwait's fertilizer-manufacturing sector; and Kuwait National Petroleum Co. K.S.C. (KNPC), which operated the country's petroleum refineries. State-owned Kuwait Investment Authority held interests in Kuwait's cement companies and manufacturers of steel pipe. Privately owned companies were active in the industrial minerals and metals sectors (table 2; U.S. Energy Information Administration, 2014).

Commodity Review

Metals

Iron and Steel.—In 2014, United Steel Industrial Co. K.S.C.C. was Kuwait's significant metals producer. The company operated a billet melt shop and a rolling mill in the Shuaiba Industrial Area that used imported iron ore. The company's rolling mill had a design capacity of 650,000 metric tons per year (t/yr), which was upgraded to 900,000 t/yr in 2010; it produced reinforcing steel bars of varying sizes and diameters. The company's melt shop had the capacity to produce 1 million metric tons per year (Mt/yr) of steel billets, which was sufficient to meet the local demand and provide an additional amount for

[1] Where necessary, values have been converted from Kuwaiti dinars (KWD) to U.S. dollars (US$) at an average rate of KWD 0.282=US $1.00.

export to neighboring countries (table 2; MEED, 2014; United Steel Industrial Co. K.S.C.C., 2015).

Industrial Minerals

Cement.—In 2014, Kuwait's cement sector was the second-largest industrial sector after hydrocarbons and contributed nearly 12% of the country's industrial revenue and about 3% of its GDP. Several cement companies operated in Kuwait and supplied most of the country's domestic demand, which amounted to about 11 Mt/yr. About 3.65 million metric tons of Kuwait's cement supply was imported from neighboring countries, such as Saudi Arabia and the United Arab Emirates. ACICO Cement Co. (a subsidiary of ACICO Industries Co. K.S.C.) produced cement in Kuwait and had the capacity to produce about 1 Mt/yr of clinker from its plant at the Shuaiba Industrial Area. The company commissioned a new white cement production line in 2014, which was expected to add about 250,000 t/yr to the company's total capacity. It was introduced in response to increased demand for the product locally, and was to be used for projects that were being carried out by the Government and the private sector. The ACICO Construction Co. (a subsidiary of ACICO Industries Co. K.S.C.) received a mobile cement unloader in 2014 from Siwertell AB, which is a subsidiary of Cargotec Oyj Corp. of Finland. The cement unloader was set at the Port of Shuaiba, which is the second-largest port in Kuwait. The diesel-operated cement unloader had an operational capacity of 300 tons per hour, and it was expected to increase the efficiency of cement handling at the port by allowing continuous unloading operations and limiting interruptions to the delivery process. ACICO Construction Co. was expected to receive a second mobile cement unloader from the same manufacturer in 2015 (table 2; Port Technology, 2014; Cargotec Oyj Corp., 2015; Global Cement, 2015; Ibrahim, 2015).

Kuwait Cement Co. K.S.C. was the leading cement producer in Kuwait. In 2014, the company implemented a project to increase its capacity to 5 Mt/yr of cement from 2.5 Mt/yr by adding a second kiln to its plant in the eastern part of the Shuaiba Industrial Area. The company also constructed a new storage terminal in the western part of the Shuaiba Industrial Area by yearend 2013 to increase the clinker storage area to approximately 230,000 square meters. In order to reduce the cost of cement production, the company used imported coal instead of petroleum coke to operate its plant (table 2; Kuwait Cement Co. K.S.C., 2014, p. 25–28, 2015).

Mineral Fuels

Natural Gas.—In recent years, Kuwait was a net importer of natural gas and its domestic energy consumption was increasing, which encouraged the Government to focus on developing its natural gas sector. In 2014, Kuwait's natural gas consumption increased by about 8.2% to 20.1 billion cubic meters compared with 18.5 billion cubic meters in 2013. Since 2009, Kuwait has been importing liquefied natural gas (LNG) at a floating storage and regasification unit near the Mina Al-Ahmadi refinery in southern Kuwait. By yearend 2014, KNPC was moving forward to approve $3.3 billion to construct an LNG import and regasification terminal at the Mina Al-Ahmadi port. The terminal was expected to have storage tanks, pipeline connections between the terminal and the existing pipeline system, and a regasification plant with a capacity of 41.4 million cubic meters per day. Construction of the LNG terminal was expected to start by yearend 2015 (U.S. Energy Information Administration, 2014; BP p.l.c., 2015, p. 23; Crisp, 2015a).

KPC signed an agreement with Royal Dutch Shell p.l.c. and BP p.l.c., both of the United Kingdom, to purchase about 3.45 billion cubic meters of LNG for the next 5–6 years. The imported LNG was expected to be used to operate local powerplants (Mirza, 2014).

Petroleum.—Kuwait's crude oil production decreased by about 2% in 2014 compared with that of 2013. Production of refined petroleum products decreased by about 7.4% in 2014, including gasoline, which decreased by about 38%, owing to a planned production decrease at the Shuaiba refinery as part of the country's refineries development plan. Kuwait's active crude oil wells decreased by about 2% to 1,760 in 2014 compared with 1,794 in 2013. Kuwait continued its plans to increase production of crude oil and refined petroleum products from current oilfields and to continue new exploration activities. One of the development projects was the Lower Fars field in northern Kuwait. The Lower Fars reservoirs, which cover an area of approximately 1,200 square kilometers, contained high-viscosity heavy crude oil ranging from 11° to 17° American Petroleum Institute (API) gravity compared with Kuwait's regular crude oil that has an average gravity of 30° API (medium crude oil), and the Kuwait Export crude oil that has an average gravity of 31.4° API (light crude oil). The project was expected to use cyclic-system simulation techniques that include injecting a steam flow into the reservoirs to heat the highly viscous crude oil and make it easier to extract, transport, and treat. By yearend 2014, KOC was in the process of awarding a $4.3 billion contact for development of the Lower Fars project to Petrofac Corp. Ltd. of the United Kingdom, which was expected to partner with Consolidated Contractors Co. (CCC) of Greece to carry out the engineering, procurement, and construction phase of the project. The project's design included the construction of a 162-kilometer (km) pipeline to transport the heavy crude oil from the project's processing facility to a storage facility at Al Ahmadi in southern Kuwait (Finlayson, 2014; 2015; Crisp, 2015b; Organization of the Petroleum Exporting Countries, 2015, p. 26, 28, 37).

In August, KPC signed a $2 billion contract to supply 65,000 barrels per day (bbl/d) of crude oil to Petron Singapore Trading Pte Ltd. (a subsidiary of Petron Corp. of the Philippines) starting in January 2015. The volume of crude oil supplied was expected to increase to 100,000 bbl/d at a later time based on interest expressed by the purchasing company (Crisp, 2014).

In 2014, Kuwait had a refining capacity of 936,000 bbl/d from three oil refineries— Mina Abdullah, Mina Al-Ahmadi, and Shuaiba. KNPC continued to expand its oil refining capacity and to produce improved grades of refined petroleum products for export, including diesel fuel and kerosene. KNPC's plans comprised investing about $40 billion in development projects, including the consolidation, expansion, and upgrade of its three oil refineries and adding a fourth refinery. The Mina Al-Ahmadi refinery was expected to decrease its capacity to 347,000 bbl/d of refined petroleum products from the current 466,000 bbl/d. The Mina Abdullah refinery was expected to increase its capacity to 454,000 bbl/d of refined petroleum products from the current 270,000 bbl/d. The Mina Abdullah and Mina Al-Ahmadi oil refineries were expected to have a combined capacity of about 800,000 bbl/d of refined petroleum products between 2018 and 2022, when the development project was scheduled to be completed. The 60-year-old Shuaiba refinery, which is located about 50 km south of Kuwait City, had a 200,000-bbl/d oil-refining capacity and was expected to be closed after the construction of a new 615,000-bbl/d-capacity oil refinery at Al-Zour in southern Kuwait. Upon completion, the Al-Zour refinery was expected to supply fuel with less than 1% sulfur content, compared with the current 4% sulfur content fuel, to domestic power-generation plants. The new fuel was expected to decrease harmful emissions and to reduce significantly air pollutants at local power-generation plants. Al-Zour refinery was also expected to supply improved grades of refined fuel products for export. When this phase of the development plan is completed (by 2019), Kuwait would have a total refining capacity of about 1.4 Mbbl/d (Finlayson, 2014; U.S. Energy Information Administration, 2014; Kuwait National Petroleum Co. K.S.C., 2015; Organization of the Petroleum Exporting Countries, 2015, p. 8).

Outlook

Kuwait's economy is expected to grow at a rate of 1.7% in 2015 and 1.8% in 2016, respectively (International Monetary Fund, 2015, p. 175). The new investment law and the proposed tax reforms that target domestic and foreign companies are expected to encourage industrial diversification and to increase the private sector's contribution to the economy. Kuwait is expected to continue with plans to increase its current crude oil and condensate production levels by 29% to reach about 4.0 Mbbl/d by 2020. Kuwait is expected to continue development of its natural gas sector with several new projects in the short and medium run. Developing the natural gas sector is expected to be essential to meet the increasing demand for domestic power production and to decrease the country's dependence on natural gas imports. Kuwait's demand for aluminum, cement, iron and steel, sand and gravel, and silica is expected to increase proportionally to the Government's plans to develop the country's infrastructure (O'Sullivan, 2013; Mirza, 2014; Port Technology, 2014; U.S. Energy Information Administration, 2014; Wilkinson, 2014; Cargotec Oyj Corp., 2015; Crisp, 2015a; Global Cement, 2015; Roscoe, 2015).

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TABLE 1
KUWAIT: PRODUCTION OF MINERAL COMMODITIES[1]

(Metric tons unless otherwise specified)

Commodity[2]		2010	2011	2012	2013	2014
METALS						
Iron and steel:[e]						
Crude steel		500,000	800,000	1,300,000	1,500,000	1,500,000
Rolled-steel bar		650,000	1,100,000	1,300,000	1,300,000	1,300,000
INDUSTRIAL MINERALS						
Cement[e]		3,000,000 r	4,000,000 r	4,000,000 r	5,100,000 r	6,400,000 [3]
Lime, hydrated and quicklime[e]		50,000	50,000	50,000	50,000	50,000
Nitrogen:						
N content of ammonia		503,000 r	521,000 r	451,000 r	552,000 r	540,000
N content of urea		444,000 r	435,000 r	379,000 r	458,000 r	450,000
Salt[e]		14,000	15,000	15,000	15,000	14,000
Sulfur:						
Elemental, petroleum byproduct		800,000 r	825,000 r	800,000	850,000 r	800,000
Sulfuric acid		18,000	18,000	18,000	18,000	18,000
MINERAL FUELS AND RELATED MATERIALS						
Natural gas:						
Gross	million cubic meters	11,950 r	13,750 r	15,742 r	16,529 r	15,249
Dry	do.	11,733 r	13,533 r	15,515 r	16,311 r	15,028
Natural gas liquids and liquefied petroleum gases	thousand 42-gallon barrels	63,000	68,000	71,000	71,000	70,000
Petroleum:						
Crude, including condensate	do.	935,130 r	1,063,900 r	1,115,700 r	1,144,270 r	1,139,900
Refinery products:						
Gasoline	do.	20,038 r	20,768 r	19,126 r	21,608 r	13,432
Kerosene	do.	66,649 r	64,568 r	65,992 r	68,547 r	71,467
Distillate fuel oil	do.	88,877 r	89,352 r	83,074 r	90,629 r	89,242
Residual fuel oil	do.	74,752 r	65,773 r	72,927 r	65,627 r	54,713
Other[4]	do.	107,200 r	81,431 r	144,686 r	115,705 r	106,324
Total	do.	357,516 r	321,892 r	385,805 r	362,116 r	335,178

[e]Estimated data are rounded to no more than three significant digits. [r]Revised. do. Ditto.
[1]Table includes data available through August 3, 2015.
[2]In addition to the commodities listed, secondary aluminum, chlorine, clays, glass, gypsum, methanol, and sand and gravel were produced, but available information is inadequate to make reliable estimates of output.
[3] Reported figure.
[4]Includes bitumen and petroleum coke.

TABLE 2
KUWAIT: STRUCTURE OF THE MINERAL INDUSTRY IN 2014

(Metric tons unless otherwise specified)

Commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity
Aluminum, secondary		Arabian Light Metals Co. K.S.C. (Kuwait Industries Co. Holding K.S.C.)	Ahmadi	15,000
Cement:				
Clinker		Kuwait Cement Co. K.S.C. (Kuwait Investment Authority, 32%, and National Industries Group, 22.4%)	2 kilns at Shuaiba Industrial Area	5,000,000
Do.		ACICO Cement Co. (subsidiary of ACICO Industries Co. K.S.C.)	do.	1,000,000
Gray portland		Kuwait Cement Co. K.S.C. (Kuwait Investment Authority, 32%, and National Industries Group, 22.4%)	Mill at Shuaiba Industrial Area	2,190,000
Do.		ACICO Cement Co. (subsidiary of ACICO Industries Co. K.S.C.)	do.	1,000,000
White		ACICO Industries Co. K.S.C.	Mill at Shuaiba	250,000
Do.		Kuwait Cement Co. K.S.C. (Kuwait Investment Authority, 32%, and National Industries Group, 22.4%)	Kiln and mill at Shuaiba Industrial Area	170,000
Iron and steel, steel:				
Crude		Al Oula Steel Manufacturing Co. K.S.C.	Shuaiba Industrial Area	500,000
Do.		United Steel Industrial Co. K.S.C.C. (Joint venture of local investors, 51%; Ahwaz Steel Commercial and Technical Services GmbH, 49%)	Melt shop at Shuaiba Industrial Area	1,000,000
Rolled:				
Bar and rod		do.	Rolling mill at Shuaiba Industrial A Area	900,000
Do.		Kuwait Reinforcement Steel Manufacturing Co. (Ali Al-Sarraf International Group Co.)	do.	400,000
Pipes		Kuwait Pipes Industries and Oil Services Co. K.S.C.	Pipe mill at Sulaibiya Industrial Area	120,000
Do.		do.	Pipe mill at Shuwaikh	65,000
Natural gas	million cubic meters	Various[1]	Various fields	17,000
Liquefied natural gas	million cubic meters per day	Kuwait National Petroleum Co. K.S.C. (KNPC) [Kuwait Petroleum Corp. (KPC), 100%]	Mina Al-Ahmadi GasPort® import facility, Mina Al-Ahmadi	17 [2]
Natural gas liquids	do.	Kuwait Oil Co. K.S.C. (KOC) [Kuwait Petroleum Corp. (KPC), 100%]	do.	65,000 [3]
Nitrogen:				
Ammonia		Petrochemical Industries Co. K.S.C. [Kuwait Petroleum Corp. (KPC), 100%]	Plant B, Shuaiba Industrial Area	676,000
Urea		do.	Plants A and B, Shuaiba Industrial Area	1,130,000
Petroleum:				
Coke, calcined		do.	Shuaiba	350,000
Crude	42-gallon barrels per day	Kuwait Oil Co. K.S.C. (KOC) [Kuwait Petroleum Corp. (KPC), 100%]	Southern and eastern fields (Burgan, Khasman, and Madina fields)	1,350,000
Do.	do.	Al-Khafji Joint Operations (Kuwait Gulf Oil Co., 50%, and Aramco Gulf Operations Co., 50%)	Khafji field, offshore Partitioned Neutral Zone	600,000
Do.	do.	Kuwait Oil Co. K.S.C. (KOC) [Kuwait Petroleum Corp. (KPC), 100%]	Northern fields (Abdali, Bahra, Ratqa, Matraba, Raudhatain, and Sabiya fields)	559,000
Do.	do.	do.	Western fields (Abdaliya, Kra' Al-Mero, Managish, and Umm Gudair fields)	427,000
Do.	do.	do.	South Fuwaris and South Umm Gudair fields, onshore Partitioned Neutral Zone	80,000

See footnotes at end of the table.

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

(Metric tons unless otherwise specified)

Commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity
Petroleum—Continued:				
Crude—Continued	42-gallon barrels per day	Kuwait Oil Co. K.S.C. (KOC) [Kuwait Petroleum Corp. (KPC), 100%] and Saudi Arabian Chevron Inc. (Chevron Corp., 100%)	Wafra field, onshore Partitioned Neutral Zone	80,000
Do.	do.	Kuwait Gulf Oil Co. [Kuwait Petroleum Corp. (KPC), 100%]	Hout field, offshore Partitioned Neutral Zone	NA
Refined products	do.	Kuwait National Petroleum Co. K.S.C. (KNPC) [Kuwait Petroleum Corp. (KPC), 100%]	Mina Al-Ahmadi refinery	466,000
Do.	do.	do.	Mina Abdulla refinery	270,000
Do.	do.	do.	Shuaiba refinery	200,000
Salt		Al Kout Industrial Projects Co. K.S.S.C.	Shuaiba	15,000
Sulfur		Kuwait National Petroleum Co. K.S.C. (KNPC) [Kuwait Petroleum Corp. (KPC), 100%]	Mina Abdulla, Mina Al-Ahmadi, and Shuaiba refineries	990,000
Do.		Kuwait Sulphuric Acid Co.	Safat	18,000

Do., do. Ditto. NA Not available.

[1]Some natural gas is produced and recovered from most crude oil production operations in Kuwait and the Partitioned Neutral Zone. Nonassociated natural gas was produced from the Sabiyah field.

[2]Seasonal operations, typically April through October.

[3]Includes refinery-produced liquefied petroleum gases.