



# 2015 Minerals Yearbook

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**ALBANIA [ADVANCE RELEASE]**

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# THE MINERAL INDUSTRY OF ALBANIA

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Albania is a Western Balkan country with coastlines on the Adriatic Sea and the Ionian Sea. The country has extractable mineral deposits of chromium, copper, iron, nickel, and petroleum. In addition to these minerals, Albania also produced bitumen, cement, clay, ferrochromium, gypsum, limestone, and steel in 2015. The country was not a significant producer of mineral commodities on a world scale with the exception of chromite, for which it accounted for about 0.9% of world production. The exploration, extraction, and processing of mineral ores constituted a substantial component of Albania's economy. Total mineral exports decreased in 2015; however, this decrease was owing primarily to lower mineral commodity prices globally (table 1; National Agency of Natural Resources, 2013, p. 9; Deloitte Audit Albania sh.p.k., 2015; World Bank, The, 2016, p. 2; Papp, 2018).

## Minerals in the National Economy

In 2015, Albania's gross domestic product (GDP) increased by 2.6% compared with a 2.0% rate of growth in 2014. The nominal GDP in 2015 was \$11.5 billion. The increase in economic growth was owing mainly to higher electricity production and increased construction activity. In real terms, industrial output, including that of mining and quarrying, increased at a rate of 5.7% in 2015. The gross value added of manufacturing increased by 9.3%. Industrial production made up about 13.1% of the GDP, and manufacturing, 5.6%. Mining and quarrying accounted for 5.7% of the GDP in 2014; data were not available for 2015 (European Commission, 2016, p. 132; Institute of Statistics, 2016a, b; International Monetary Fund, 2016, p. 5; World Bank, The, 2016).

Minerals—in particular, base metals—were a significant source of export revenue for Albania. In 2015, mineral products continued to be Albania's leading exported products, accounting for 26.5% the country's total exports, although they decreased in value by 25%. Exports of base metals and articles made of base metals constituted the third-ranked category and accounted for 14.1% of total exports; they decreased in value by 5%. In terms of individual mineral commodities, mineral fuels accounted for 18.6% of Albania's total exports, followed by iron and steel (7.8%), aluminum (2.2%), copper (0.6%), and lead (0.2%). The share of exports for all minerals except aluminum decreased in 2015. The country exported only a small amount of zinc and no nickel (Institute of Statistics, 2016c, p. 5, 11, 13, 15).

## Production

Chromium accounted for 76% of Albania's mine output, by value, in 2014. Limestone and other construction minerals represented the second largest group of mineral commodities produced, accounting for 12% of the country's mine output. Bitumen, copper, and nickel together also accounted for about 12% of Albania's mine output in 2014 (Deloitte Audit Albania sh.p.k., 2015, p. 49).

The production of many minerals showed substantial changes in 2015. Among metals, the production of copper (ore and Cu content) decreased by 46%, and crude steel, by an estimated 10%. The production of nickel (ore) increased by 39% and nickel (Ni content) by 38%. Among industrial minerals, gypsum output decreased by 20%, whereas the production of clay increased by 43%. Among mineral fuels and related materials, bitumen output increased by 23%. Lignite coal production resumed in 2015 and surpassed pre-2014 levels. Coke output remained at zero (table 1).

## Structure of the Mineral Industry

All mineral-producing companies were privately owned except for petroleum and natural gas producer Albpetrol Sh.A. and oil refiner Albanian Refining and Marketing Organization Sh.A. (ARMO). In December 2015, the Government placed its privatization plan for the wholly state-owned Albpetrol on hold. The Government held a 15% stake in ARMO, which declared bankruptcy in June 2015. There were a total of 757 active enterprises in mining and quarrying in 2015 compared with 699 in 2014. In 2015, 325 companies were engaged in mining of metal ores, 7 in mining of coal and lignite, and 318 in other mining and quarrying. In addition, 32 companies were active in the extraction of crude petroleum and natural gas. Within the manufacturing sector, 876 companies were engaged in the manufacture of nonmetallic mineral products, 99 in the manufacture of base metals, and 12 in the manufacture of coke and refined petroleum products. Table 2 is a list of the country's major mineral industry facilities and their ownership (European Bank for Reconstruction and Development, 2015, p. 3; Tirana Times, 2015a, b; Institute of Statistics, 2016b, p. 23, 39).

## Commodity Review

### Metals

**Chromium.**—Chromite production decreased by 6% in 2015. AlbChrome Sh.p.k., which was a subsidiary of the Balkan Finance Investment Group, operated chromite mines in Bulqiza, an enrichment plant in Klos, and ferrochrome smelters in Burrel-Mat and Elbasan. The company extracted about 69,000 metric tons per year (t/yr) of chromite (chromium content) in Bulqiza. Through a new shaft that would extract new reserves from greater depths, AlbChrome planned to increase production to 100,000 t/yr and extend the life of the mine. It also expected to bring the Qafe Buall section of the mine into production in the near future, which would increase the output at Bulqiza by 40,000 t/yr of chromite (chromium content). AlbChrome planned to increase the production capacity of its ferrochromium plant in Elbasan to 42,000 t/yr by 2016 as a part of its ongoing investment. The plant's entire output was exported to countries in the Americas, Asia, and Europe (Balkan Finance Investment Group, 2015a, b; Deloitte Audit Albania sh.p.k., 2015, p. 45).

**Copper and Gold.**—Beralb Sh.A., which was a subsidiary of Ekin Maden Ticaret ve Sanayi A.Ş. of Turkey, had a 30-year concession (in place since 2001) for seven copper mines; Beralb was the operator for three of them—the Karma 2, the Lak Roshi, and the Munella Mines. In September 2015, Beralb announced that it would suspend operations at all three mines for at least 1 year until global copper prices recovered. Since 2010, Beralb had exported its copper output to its partners in China and Turkey. In May 2014, Ekin Maden had entered into partnership with Jiangxi Copper Company Ltd. of China, which acquired a 50% stake in Beralb. The consortium expanded its ore-processing capacity at the Fushe-Arrez enrichment plant to 600,000 t/yr (Beralb Sh.A., 2015; Deloitte Audit Albania sh.p.k., 2015, p. 46–47).

Tirex Resources Ltd. of Canada held metal exploration and exploitation licenses for the Mirdita and the Rehova volcanogenic massive sulfide (VMS) prospects in Albania. Assay results in the Mirdita District in 2008 showed high gold and silver mineralization in addition to base-metal mineralization. In 2015, Tirex Resources conducted metallurgical zinc and copper tests at the Koshaj deposit in the Mirdita District of northern Albania. In December 2015, Tirex Resources began preparations for field work at the Rehova copper project located near Korca in central Albania. The company obtained a 25-year mining license for Rehova in January 2015 and an environmental permit in June 2015. When mining stopped at the site in 1990, the Albanian Geological Survey had reported remaining resources of 2.9 million metric tons (Mt) grading 2.14% copper (Tirex Resources Ltd., 2015a–c).

**Iron and Steel.**—In 2015, Kürüm International, which was a subsidiary of Kürüm Holding of Turkey and the sole steelmaker in Albania, filed for bankruptcy owing to low global steel prices during the year, an inability to compete with lower-priced steel imports from China, and debt of \$300 million. The company, which had been the leading producer of steel in the Balkans and Albania's leading exporter through 2014, had a 70% share of the country's steel market and also produced lime and liquid oxygen. In April 2015, Kürüm International's Elbasan steel plant was temporarily suspended by the State Inspectorate for Environment owing to environmental pollution. The company was ordered to submit a waste management plan before it resumed production (Tirana Times, 2015c; Bne IntelliNews, 2016).

**Nickel.**—Cunico Resources NV of the Netherlands, which was the leading ferronickel producer in Europe, owned nickel mine sites through its two subsidiary companies, Feni Korcha and Albanian Resources, in Albania. The company supplied its ferronickel plant in Macedonia with nickel ore from four mines that it operated in Albania as well as company-owned mines in Guatemala and Macedonia. Cunico also imported ore from Indonesia, the Philippines, and Turkey to produce ferronickel. The Albanian company Alfa Nikel Shpk operated the Bilisht nickel mine in Korca District through a concession agreement signed in 2011 (Cunico Resources NV, 2013, p. 2–3; 2015, p. 2; U.S. Commercial Service, 2016a).

## **Industrial Minerals**

**Cement.**—Cement production increased by an estimated 3% in 2015. Antea Cement Sh.A., which was a subsidiary of the TITAN Group of Greece, and Seament Holding of Lebanon, each had a 40% share of Albania's growing cement market. Cement consumption increased to 1.6 Mt in 2015 from 1.5 Mt in 2014, of which 20% was supplied by imports. Antea Cement operated its greenfield plant in Burizane, which had a production capacity of 1.5 million metric tons per year (Mt/yr) of cement and 3,300 metric tons per day of clinker. The company exported cement and clinker to Egypt, Italy, Libya, and Montenegro. In February 2015, TITAN Group acquired the 20% stake in Antea Cement previously held by the European Bank for Reconstruction and Development. Seament Holding operated two cement plants in Albania—the Fushe Kruje cement plant, which had a production capacity of 1.33 Mt/yr of cement, and the Elbasan cement plant, which had a production capacity of 0.3 Mt/yr of cement and 0.2 Mt/yr of clinker (Antea Cement Sh.A., 2015, p. 6; International Cement Review, 2015, p. 28–29; TITAN Group, 2016, p. 22–23).

## **Mineral Fuels**

**Petroleum and Natural Gas.**—In 2015, crude petroleum production accounted for about 60% of Albania's primary energy production, whereas natural gas production accounted for only 1%. Total petroleum reserves were estimated to be about 220 million barrels (Mbbbl) and natural gas reserves were estimated to be about 5.7 billion cubic meters. Albania's Patos-Marinzha field, which was operated by Bankers Petroleum Ltd. of Canada, had 7.5 billion barrels of petroleum in place (reserves plus contingent resources) and was considered the largest onshore petroleum field in Europe (Institute of Statistics, 2016d; Kalo & Associates, 2016, p. 20; U.S. Commercial Service, 2016b).

In 2015, total crude petroleum production in Albania, which was primarily by Bankers Petroleum, decreased to about 9.4 Mbbbl from 10 Mbbbl in 2014. Although investment in the country's petroleum sector decreased in 2015, hydrocarbon exploration was ongoing in both onshore and offshore blocks. Royal Dutch Shell plc of the United Kingdom and the Netherlands operated Blocks 2 and 3. Onshore Blocks 1, 5, 6, 7, A, B, C, D, E, Panaja, and Velca and the offshore blocks Rodoni North and Rodoni South remained to be licensed. In May and August 2015, new bidding rounds were announced for exploration in seven blocks. The Government was in negotiations with Navitas Petroleum Ltd. of Houston (United States) and Israel for the Dumrea Block and with Royal Dutch Shell for Block 4 (Deloitte Audit Albania sh.p.k., 2015, p. 32; World Oil, 2015; Kalo & Associates, 2016, p. 20; U.S. Commercial Service, 2016b).

In July 2015, the construction of the Albanian section of the Trans-Adriatic Pipeline (TAP) began. TAP would transport natural gas from Azerbaijan's Shah Deniz II natural gas field in the Caspian Sea through Turkey, Greece, and Albania, and then across the Adriatic Sea to Italy (European Commission, 2015, p. 43; Kalo & Associates, 2016, p. 16).

## Outlook

Albania's production of chromite, copper, and steel are likely to continue to decrease if global metal prices do not increase, notwithstanding recent capacity expansions in the country. Steel output may cease altogether if K ur m International's bankruptcy leads to suspension of operations at the Elbasan plant. Tirex Resources' exploration for precious metals, such as gold, in Albania is at a relatively early stage and is not expected to lead to production in the near future. The planned privatization of Albpetrol and the exploration of new blocks in the Adriatic Sea and the Ionian Sea may increase petroleum production in the medium-to-long term. Refined fuels output may decrease further if ARMO's bankruptcy causes its refinery in Ballsh to close. Large-scale energy projects, such as the TAP, are likely to result in increased production of cement and other construction materials. Once completed, the TAP would also increase the natural gas supply in Albania.

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TABLE 1  
ALBANIA: PRODUCTION OF MINERAL COMMODITIES<sup>1</sup>

(Metric tons unless otherwise specified)

Commodity <sup>2</sup>	2011	2012	2013	2014	2015	
METALS						
Chromium:						
Chromite, gross weight (18% to 42% Cr <sub>2</sub> O <sub>3</sub> )	330,938	380,349	521,080	683,874 <sup>r</sup>	639,909	
Marketable ore (41.6% Cr <sub>2</sub> O <sub>3</sub> )	123,000 <sup>e</sup>	141,140	198,010	260,000 <sup>r,e</sup>	243,000 <sup>e</sup>	
Concentrate	38,000 <sup>e</sup>	43,900	10,501	17,300 <sup>e</sup>	16,200 <sup>e</sup>	
Copper:						
Ore, gross weight	305,284	479,720	507,105	259,137	140,386	
Cu content of ore (1.36% average) <sup>e</sup>	4,400	7,000	6,900	3,500	1,900	
Iron and steel:						
Metal, ferroalloys, ferrochromium	28,694	24,018	24,692	34,897	38,000 <sup>e</sup>	
Steel:						
Crude	463,620	381,692	312,000 <sup>e</sup>	310,000 <sup>e</sup>	280,000 <sup>e</sup>	
Rolled	295,333	248,327	258,000	250,000 <sup>r,e</sup>	225,000 <sup>e</sup>	
Nickel, ore:						
Iron-nickel and nickel-silicate ores, gross weight	270,000 <sup>e</sup>	75,017 <sup>3</sup>	215,086 <sup>3</sup>	535,128 <sup>r,3</sup>	742,180 <sup>3</sup>	
Ni content of ores <sup>e</sup>	3,000	1,000	2,000	5,000	6,900	
INDUSTRIAL MINERALS						
Cement, hydraulic	thousand metric tons	2,200 <sup>r,e</sup>	2,230 <sup>r</sup>	2,340 <sup>r</sup>	2,150 <sup>r,e</sup>	2,210 <sup>e</sup>
Clay, kaolin	do.	974	961	768	810 <sup>r</sup>	1,161
Gypsum		80,000 <sup>e</sup>	91,021	111,649	106,433 <sup>r</sup>	85,263
Lime		43,620	23,096	23,007	23,000 <sup>e</sup>	23,000 <sup>e</sup>
Limestone	cubic meters	2,400,000 <sup>e</sup>	2,727,451	1,811,378	3,189,483 <sup>r</sup>	3,071,282
Sand, silica	do.	12,000 <sup>e</sup>	3,598	2,550	10,731	10,000 <sup>e</sup>
MINERAL FUELS AND RELATED MATERIALS						
Coal, lignite <sup>e</sup>		2,900 <sup>r</sup>	2,900 <sup>r</sup>	2,900 <sup>r</sup>	--	98,600
Gas, natural, gross production	thousand cubic meters	16,400 <sup>r</sup>	16,400 <sup>r</sup>	17,500 <sup>r</sup>	30,500 <sup>r</sup>	32,700 <sup>r</sup>
Petroleum:						
Crude	thousand 42-gallon barrels	5,895	6,787	8,836	10,029	9,377
Refinery products:						
Bitumen		44,000	80,728	169,800	116,806 <sup>r</sup>	143,500
Coke <sup>e</sup>		62,000	15,000	--	--	--
Fuels	thousand 42-gallon barrels	560	132	335	2,789	3,000 <sup>e</sup>

<sup>e</sup>Estimated; estimated data are rounded to no more than three significant digits. <sup>r</sup>Revised. do. Ditto. -- Zero.

<sup>1</sup>Table includes data available through October 26, 2016.

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

<sup>3</sup>Reported figure.



TABLE 2  
ALBANIA: STRUCTURE OF THE MINERAL INDUSTRY IN 2015

(Thousand metric tons unless otherwise specified)

Commodity		Major operating companies	Location of main facilities	Annual capacity <sup>c</sup>
Bitumen		Bitumi Selenica Sh.A.	Selenica Mine and smelter, southwestern Albania	NA
Cement		Fushe Kruje Cement Factory, Sh.p.k. (Seament Holding)	Fushe Kruje, 20 kilometers north of Tirana	1,330
Do.		do.	Elbasan cement plant, central Albania	300
Do.		Antea Cement Sh.A. (TITAN Group, 80%, and International Finance Corp., 20%)	Burizane, 35 kilometers north of Tirana	1,500
Do.		Colacem Albania Sh.p.k. (Colacem S.p.A.)	Balldre, northwestern Albania	500
Chromium		AlbChrome Sh.p.k. (Balkan Finance Investment Group, 100%)	Mine in Bulqiza, 40 kilometers northeast of Tirana	80
Do.		do.	Pogradec (including Katjiel and Pojske Mines)	NA
Do.		Numerous small producers	Mostly concentrated near Bulqiza	NA
<b>Copper:</b>				
Mine output, gross weight		Beralb Sh.A. (Ekin Maden Ticaret ve Sanayi A.Ş., 50%, and Jiangxi Copper Company Ltd., 50%)	Munella Mine, 25 kilometers from Fushe-Arrez	300
Do.		do.	Lak Roshi Mine, 14 kilometers from Fushe-Arrez	200
Do.		do.	Karma 2 Mine near Shkodra in the northwest	150
Processed ore		do.	Fushe-Arrez flotation plant, northern Albania	600
Ferrochromium		AlbChrome Sh.p.k. (ACR) (Balfin, 100%)	Elbasan ferrochromium plant, central Albania	34
Do.		do.	Burrel ferrochromium plant, northern Albania	13
Do.		do.	Klos enrichment plant, eastern Albania	NA
Lime		Kürüm International Sh.A. (Kürüm Holding, 100%)	Elbasan, 32 kilometers southeast of Tirana	72
Natural gas	million cubic meters	Albpetrol Sh.A. (Government owned)	Gasfields in southwestern Albania	NA
Do.	do.	TransAtlantic Petroleum Ltd.	Delvina gasfield in southern Albania	NA <sup>1</sup>
Nickel		Feni Korcha and Albanian Resources (Cunico Resources NV, 100%)	Bitincka Mine near Kapstica, Guri-I-Kuq Mine near Pogradec, Nome Mine in Kukes, and Treni Mine near Korca	NA
Do.		Alfa Nikel Shpk	Bilisht Mine, Korca District	200
<b>Petroleum:</b>				
Crude	42-gallon barrels per day	TransAtlantic Petroleum Ltd.	Ballsh-Hekal, Cakran-Mollaj, and Gorischt-Kocul oilfields in southwestern Albania	2,400
Do.	do.	Bankers Petroleum Ltd.	Oilfields at Kucova and Patos-Marinza, east of Fier in south-central Albania	27,700
Refined	do.	Albanian Refining and Marketing Organization Sh.a. (ARMO) (Heaney Assets Corp., 85%, and Government, 15%)	Ballsh refinery, southern Albania	23,200 <sup>2</sup>
Do.	do.	do.	Fier refinery, southwestern Albania	11,600
Steel		Kürüm International Sh.A. (Kürüm Holding, 100%)	Electric arc furnace plant at Elbasan	700

<sup>c</sup>Estimated. Do., do. Ditto. NA Not available.

<sup>1</sup>TransAtlantic Petroleum Ltd. did not produce any natural gas in 2015.

<sup>2</sup>The Ballsh refinery closed in 2015.