



# 2015 Minerals Yearbook

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**SRI LANKA [ADVANCE RELEASE]**

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# THE MINERAL INDUSTRY OF SRI LANKA

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Sri Lanka has a variety of mineral resources, such as clays (including ball clay and kaolin), dolomite, feldspar, graphite, limestone, mica, mineral sands (containing ilmenite, rutile, and zircon), phosphate rock, quartzite, and salt. Minerals mined in Sri Lanka were clays, feldspar, gemstones, graphite, gypsum, mica, phosphate rock, salt, silica sand, stone (limestone and quartzite), titanium minerals, and zircon. The mineral-processing industry produced cement, lead (secondary), iron and steel semimanufactures, and petroleum products.

## Minerals in the National Economy

In 2015, the real gross domestic product (GDP) increased by 4.8% compared with a 4.9% (revised) increase in 2014. The nominal GDP was \$82.32 billion. In 2015, the output value of the industrial sector decreased by 3% compared with an increase of 3.9% (revised) in 2014 and accounted for 26.2% of the GDP compared with 26.7% (revised) in 2014. The output value of the mining and quarrying sector decreased by 0.9% and accounted for 2.3% of the GDP, and that of the construction sector decreased by 0.9% and accounted for 6.8% of the GDP. The output value of the manufacturing sector increased by 4.7% and accounted for 15.7% of the GDP. In 2015, 64,000 workers, or less than 1% of the country's population, were employed in the mining and quarrying sector compared with 79,000 workers (1% of the country's population) in 2014 (Central Bank of Sri Lanka, 2015a, p. 1, 5; 2015b, p. 126; Asian Development Bank, 2016, p. 188; International Monetary Fund, 2016, p. 232; World Bank, The, 2016).

In 2015, exports decreased by about 6.0% and were valued at \$10.5 billion compared with \$11.1 billion (revised) in 2014, and imports decreased by 3.0% and were valued at \$18.9 billion compared with \$19.4 billion (revised) in 2014. In 2015, the value of exports of gemstones, diamond, and jewelry decreased by 15.7% to \$331.7 million from \$393.6 million in 2014, and the value of exports of other minerals decreased by 52.3% to \$28.4 million from \$59.5 million; the value of petroleum exports increased by 10.6% to \$373.9 million from \$338.0 million. Sri Lanka's main export partners were the United States, which received 27.0% of Sri Lanka's exports, the United Kingdom (9.8%), India (6.1%), Germany (4.0%), and Belgium (3.0%) (Central Bank of Sri Lanka, 2015c, p. 141, 146–147).

In 2015, the value of fertilizer imports increased by 6.3% to \$289.6 million from \$272.4 million; the value of petroleum imports decreased by 41.3% to \$2,699 million from \$4,597 million; and the value of diamond, precious stones, and metals decreased by 7.9% to \$161.5 million from \$175.4 million. Sri Lanka's main import partners were India (which supplied 23.0% of Sri Lanka's imports), China (20.0%), Singapore (6.0%), and the United States (2.0%) (Central Bank of Sri Lanka, 2015c, p. 143, 146–147).

## Structure of the Mineral Industry

Table 2 is a list of major mineral industry facilities.

## Production

In 2015, production of clays for cement increased by 36%; mica (scrap), by 33%; cement, by 21%; ilmenite, by 20%; and graphite (all grades), by 5%. The production of secondary lead decreased by 44%. Data on mineral production are in table 1.

## Commodity Review

### Metals

**Titanium and Zirconium.**—In 2013, Iluka Resources Ltd. of Australia reached an agreement to acquire PKD Resources (Pvt.) Ltd. and four associated mineral-sand tenements [with an area of 224 square kilometers (km<sup>2</sup>)] and to explore mineral-sand deposits in Puttalam District in Sri Lanka's North Western Province. As of 2015, the total resources were estimated to be 689.9 million metric tons (Mt) (213.9 Mt of measured resources, 47.2 Mt of indicated resources, and 428.8 Mt of inferred resources) at an average grade of 8.2% heavy minerals. Ilmenite is the major mineral (in terms of content), with a grade of up to 67% of the heavy-mineral content, and rutile and zircon graded up to 4%. In 2015, Iluka completed scoping studies and started to evaluate the Puttalam deposit for the development and processing of mineral sands. Iluka was planning to conduct a prefeasibility study in 2016 (Iluka Resources Ltd., 2012; 2013, p. 1, 5; 2014, p. 25, 28–29, 159; 2015, p. 95).

### Industrial Minerals

**Cement.**—In 2015, Tokyo Cement Co. (Lanka) Plc [a partnership between Nippon Coke and Engineering Co. (formerly Mutsui Mining Co.) of Japan and Saint Anthony's Consolidated (Pvt) Ltd.] and Fuji Cement Co. (Lanka) Ltd. Plc merged and created a new company that retained the name Tokyo Cement Co. (Lanka) Plc. In 2015, Tokyo Cement Co. (Lanka) announced that it planned to invest \$50 million in the construction of a cement plant at Trincomalee in Eastern Province that would expand the company's capacity by 1 million metric tons per year. The construction of the cement plant, which would be accomplished through Tokyo Cement Co. (Lanka)'s new subsidiary Tokyo Eastern Cement Co. Ltd., was expected to begin in 2017 (table 1; Global Cement, 2013; 2015a, b; Tokyo Cement Group, 2015, p. 31).

**Gemstones.**—Sri Lanka is known for producing a variety of gemstones, including corundum (parthmaraga), chrysoberyl, garnet, ruby, spinel, and tourmaline, and it remained one of the world's most important producers of Ceylon Blue sapphire. The best known areas for gemstone mining in Sri Lanka are Balangoda, Elahera, Kamburupitiya, Moneragala, Okkampitiya,

and Ratnapura. In 2014, Gemfields plc. of the United Kingdom entered into a joint venture with East West Gem Investments Ltd. (EWGI) of Jersey [United Kingdom] to explore for sapphire and other gemstones through three unspecified Sri Lankan subsidiaries. According to the joint-venture agreement, Gemfields acquired a 75% interest and EWGI held a 25% interest in 16 gemstone-mining exploration licenses. The joint venture was in the process of establishing infrastructure and starting geologic assessment of the area encompassing the joint venture's gemstone-mining exploration licenses. The company also planned to create a gemstone trading company—Ratnapura Lanka Gemstones (Pvt) Ltd.—that would trade rough sapphire. In 2015, the new Government canceled the gemstone-mining exploration licenses that had been issued to 16 foreign companies by the former Government. The decision to cancel the licenses was made in response to protests by local gemstone producers, who feared that mining activities by foreign companies would exhaust the deposits and that foreign companies would have control of the gemstone market (Geological Survey and Mines Bureau, 2012, p. 24; Brighthouse, 2014; Business Wire, 2014; National Gem and Jewellery Authority, 2014; Thomson Reuters, 2014; EconomyNext, 2015; Lanka Business Online, 2015).

**Graphite.**—Sri Lanka is known for its highly valued, high-purity vein graphite. In 2015, AMG Advanced Metallurgical Group N.V. of the Netherlands, which owned 100% of AMG Graphit Kropfmuhl GmbH (AMG Graphite) of Germany, sold a 10% share in Bogala Graphite Lanka Plc. (Bogala) and a 40% share in AMG Graphite (which owned 90% of Bogala) to Alterna Capital Partners LLC of the United States. Bogala received approval to explore graphite deposits in a 56-km<sup>2</sup> area encompassing the towns of Kalutara, Kegalle, and Matugama in Western Province, and a 33-km<sup>2</sup> area encompassing the towns of Galigamuwa, Kohombagahawatte, and Rangala in Sabaragamuwa Province (Geological Survey and Mines Bureau, 2012, p. 19; HighBeam Research, 2015).

In 2015, Bora Bora Resources Ltd. (BBR) of Australia made the decision to terminate the Heads of Agreement with RS Mines (Pvt) Ltd. (RS Mines) when material concerns raised with RS Mines were not resolved to the satisfaction of BBR. The binding Heads of Agreement had been reached in 2014 between BBR and RS Mines for BBR to acquire 50% of the Queens Graphite Mine. The companies planned to revise the production process at the Queens Graphite Mine and make modifications to the graphene oxide production facilities located 2 kilometers (km) north of the Kahatagaha Graphite Mine (Bora Bora Resources Ltd., 2015, p. 6).

In 2015, BBR continued exploration work on the Matale and the Paragoda projects. BBR acquired a 75% interest in tenements of the Matale vein graphite project near Kandy; the remaining 25% was held by Sri Lanka's Esna Business Advisory Group. The Matale project had exploration licenses in place for 32 km<sup>2</sup> of land and had submitted exploration applications for an additional 109 km<sup>2</sup> of land in areas surrounding the state-owned Kahatagaha Graphite Mine. In addition to the Matale project, BBR acquired 100% of Plumbago Mining (Pty.) Ltd. as a part of the deal; Plumbago held 75% of Plumbago Lanka (Ptv.) Ltd. (Bora Bora Resources Ltd., 2015, p. 4, 6, 47; Plumbago, 2016).

The Paragoda North and South project had exploration licenses in place for 62 km<sup>2</sup> of land in central Sri Lanka. In 2015, the license for the Paragoda North and South project was renewed by the Geological Survey and Mines Bureau (GSMB) for 2 years. During geologic mapping of the Paragoda project, 41 historic pits, 22 adits, and 19 shafts, were identified. BBR planned to conduct an onground geophysical survey of its southern graphite projects, which included the Ambalangoda, the Baduralia, and the Neluwa areas (Bora Bora Resources Ltd., 2015, p. 5).

The Kingfisher prospect, which was located 10 km north of the towns of Melsiripura and Kahatagaha and the Queens Graphite Mine in central Sri Lanka, contained an old pit and workings from artisanal operations. In 2015, BBR completed the first stage of diamond drilling, and the results identified several high-grade intercepts containing 90% to 98.4% total graphite content in the drill core (Bora Bora Resources Ltd., 2012, p. 7; 2014; 2015, p. 3, 5–6, 10; Asia Miner, 2013).

In 2015, First Graphite Ltd. (formerly MRL Corp. Ltd.), owing to a successful drilling program, asked the GSMB to convert exploration licenses for areas in Pandeniya (Central Province) into an industrial mining license. First Graphite held at least four exploration licenses for high-potential graphite projects that cover an area of 45 km<sup>2</sup> through its subsidiary MRL Graphite (Pvt) Ltd.; the licenses included the areas of Hikkaduwa (Southern Province), Palinda Nuwara (Western Province), and Warakapola (Sabaragamuwa Province). In 2014, MRL signed a drilling contract with the GSMB to drill at three locations in Pandeniya and Bopitiya (Central Province). The drilling program was completed at Pandeniya. First Graphite was planning to start a drilling program at Bopitiya in the first half of 2016 (Mongolian Resources Ltd., 2013a, p. 4; 2013b, p. 5; MRL Corp. Ltd., 2013; 2015, p. 5, 6; Asia Miner, 2014; Bloomberg, 2015).

In 2015, First Graphite started a drilling program in the area of Aluketiya to further identify graphite mineralization. Aluketiya is located in Meegahatenna within Kalutara District, approximately 85 km from Colombo. In 2014, First Graphite's predecessor (MRL Corp.) was granted the Aluketiya mining license and the Pujapetiya project exploration license. The Pujapetiya project exploration license covers an area of 18 km<sup>2</sup>, and the area was located approximately 30 km south of the Kahatagaha and the Kolongaha Mines (MRL Corp. Ltd., 2015, p. 5–7).

## Outlook

Sri Lanka's graphite production and mineral sands production are expected to increase owing to Government and foreign investments and company expansions. Despite Government efforts to prevent foreign investment in gemstone mining activities, the country's gemstone production most likely will increase as a result of foreign investment.

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TABLE 2  
SRI LANKA: STRUCTURE OF THE MINERAL INDUSTRY IN 2015

(Thousand metric tons unless otherwise specified)

| Commodity                | Major operating companies<br>and major equity owners   | Location of main facilities   | Annual<br>capacity <sup>e</sup>                      |         |
|--------------------------|--|---|--|---------|
| Aluminum, secondary      | Castalloy  | Colombo   | 1.   |         |
| Do.                      | Lanka Aluminium Industries   | do.   | NA.  |         |
| Do.                      | Zenith Aluminium Co.   | do.   | NA.  |         |
| Do.                      | Alumex Ltd.  | Gonawala, Central Province  | 1.45.  |         |
| Do.                      | Alumex (Pvt.) Ltd.   | Makola, Western Region  | NA.  |         |
| Do.                      | Lanka Refractories Ltd.  | Meepe, Padukka, Colombo District  | 8.   |         |
| Cement                   | Lafarge Holcim (Lanka) Ltd. (part of Holcim Ltd.)  | Cement plant at Puttalam<br>and grinding unit in Galle                                | 1,400.   |         |
| Do.                      | Sri Lanka Cement Corp. (Ministry of Industry<br>and Commerce)  | Kankesanthurai, Jaffna District   | 200.   |         |
| Do.                      | do.  | Puttalam, Puttalam District   | 400.   |         |
| Do.                      | Tokyo Cement Co. (Lanka) Plc.  | Trincomalee grinding unit<br>and 2 mills  | 1,800.   |         |
| Clay, ball               | Lanka Ceramic Ltd.   | Dediyawala, Western Province  | NA.  |         |
| Gemstones                | National Gem and Jewellery Authority   | Ratnapura, Elahera,<br>Moneragala, Balangoda<br>Kamburupitiya, Okkampitiya            | NA.  |         |
| Graphite                 | Kahatagaha Graphite Lanka Ltd. (Ministry of Industry<br>and Commerce)                                  | Kahatagaha Mine, Kurunegala<br>District   | 6.   |         |
| Do.                      | Bogala Graphite Lanka Plc. (AMG Graphit Kropfmuhl<br>GmbH, 90%, and Alterna Capital Partners LLC, 10%) | Bogala Mine, Kegalle District   | 7.   |         |
| Do.                      | Sakura Pvt. Ltd.   | Ragedara Mine, North Western<br>Province  | NA.  |         |
| Lead, secondary          | Navam Lanka Ltd. (Gravita India Ltd., 52%)   | Marigama Export<br>Processing Zone,<br>Marigama, Gampaha District                     | 7.   |         |
| Limestone                | Lafarge Holcim (Lanka) Ltd. (part of Holcim Ltd.)  | Arawakalu quarry  | 750.   |         |
| Petroleum, refined       | 42-gallon<br>barrels per day   | Ceylon Petroleum Corp. (Ministry of Petroleum and<br>Petroleum Resources Development) | Sapugaskanda   | 50,000. |
| Do.                      | Lanka Indian Oil Co. (Indian Oil Corp. Ltd., 75%)  | Colombo   | NA.  |         |
| Phosphate rock           | Lanka Phosphate Co. Ltd. (Ministry of State Resources<br>and Enterprise Development)                   | Eppawala, North Central<br>Province   | 36.  |         |
| Salt                     | Puttalam Salt Ltd. (Raigam Wayamba Saltern Plc.)   | Puttalam, Puttalam saltern  | 30.  |         |
| Do.                      | Southern Salt (Pvt.) Ltd. (Raigam Wayamba Saltern Plc.)  | Ranna, Bata-Atha salterns   | NA.  |         |
| Steel, semimanufacturers | Ceylon Steel Corp. Ltd.  | Oruwala, Athurugiriya   | 250.   |         |
| Do.                      | Melwire Rolling (Pvt.) Ltd.  | Colombo   | NA.  |         |
| Do.                      | GTB Colombo Corp. (Pvt.) Ltd.  | do.   | NA.  |         |
| Do.                      | Elsteel Pvt. Ltd.  | Katunayake, Western Province  | NA.  |         |
| Do.                      | Melbourne Metal Industries Ltd.  | Colombo   | NA.  |         |
| Do.                      | Bhuwarka Steel Industries Ltd.   | do.   | 25.  |         |
| Titanium, mineral sands  | Lanka Mineral Sands Co. Ltd. (Ministry of State Resources<br>and Enterprise Development)               | Pulmoddai, Eastern Province   | 125,000 ilmenite,<br>12,000 rutile,<br>8,000 zircon. |         |
| Do.                      | Mirama Minerals  | Dambulla, Matale District   | NA.  |         |

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