2015 Minerals Yearbook

PARAGUAY AND URUGUAY [ADVANCE RELEASE]

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The Mineral Industries of Paraguay and Uruguay

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PARAGUAY

Paraguay's mineral industry included cement, crushed stone, and iron and steel. The country's real gross domestic product (GDP) increased by 3.0% compared with that of 2014, and the mining sector made only a minor contribution of about 0.1% to the country's GDP. The country continued to rely on crude petroleum and refinery products imports to meet demand. In 2015, electric power was one of the leading economic activities in the country, accounting for 25% of the country's total exports. Paraguay's primary energy production was composed exclusively of renewable energy sources, such as hydropower and biomass. The country had three hydroelectric plants—the Acaray hydroelectric plant, the Itaipu Binacional plant (a joint project with Brazil), and the Yacyreta Binacional plant (a joint project with Argentina). The Government-owned Administración Nacional de Electricidad (ANDE) was engaged in the generation, transmission, and distribution of electric power in the country (Banco Central del Paraguay, 2016a; World Bank Group, 2016).

Government Policies and Programs

The Dirección de Recursos Minerales [Mineral Resources Directorate], which was part of the Ministerio de Obras Públicas y Comunicaciones [Ministry of Public Works and Communications] (MOPC), is the Government entity responsible for the administration of the mining sector. The mining sector is regulated by the Mining Law (law No. 31.180/2007), which was modified by law No. 4.269/11 in 2011 and by law No. 4.935/2013 in 2013. Law No. 4.935/2013 states that mining rights can be assigned for those who qualify and meet the conditions required by the law, with prior authorization from the MOPC, and for those who enroll in the official mining cadaster (Republica del Paraguay, 2013, p. 1–2).

Paraguay continued to be a member of the Mercado Común del Cono Sur (MERCOSUR), which is a trade association in the Americas whose other member countries were Argentina, Brazil, Uruguay, and Venezuela (Venezuela's membership was suspended in 2016). Other associated countries included Bolivia (which is in the process of accession), Chile, Colombia, Ecuador, Guyana, Peru, and Suriname. In 2015, Paraguay's exports and imports to and from MERCOSUR accounted for about 41% each of the country's exports and imports (Banco Central del Paraguay, 2016a; Mercado Común del Cono Sur, 2016).

Production

Data on mineral production are in table 1.

Structure of the Mineral Industry

Table 2 is a list of major mineral industry facilities.

Mineral Trade

The total value of Paraguay's exports was about $8.4 billion in 2015 compared with about $9.6 billion in 2014. The country's major export partners were, in decreasing order of export value, Brazil (which received 32% of Paraguay's exports), Russia (9%), and Argentina and Chile (7% each). The total value of Paraguay's imports was about $9.5 billion in 2015 compared with $11.3 billion in 2014. The country's major import partners in 2015 were, in decreasing order of import value, Brazil (which supplied 25% of Paraguay's imports), China (24%), Argentina (15%), and the United States (8%) (Banco Central del Paraguay, 2016a, b).

Paraguay's exports to the United States were valued at about $162 million in 2015 compared with $196 million in 2014. Imports from the United States were valued at about $1.5 billion in 2015 compared with about $2.1 billion in 2014. Fuel oils accounted for $82.0 million, and petroleum products, $28.0 million (U.S. Census Bureau, 2016a, b).

Commodity Review

Metals

Gold.—Latin American Minerals Inc. (LAMI) of Canada continued with its bulk-sampling operation at the Paso Yobai gold project, which is located in the Department of Guaira about 160 kilometers (km) east of the capital city of Asuncion. LAMI began its bulk-sampling operation at Paso Yobai's Independencia Mine in 2012 to evaluate the grades and the continuity and characteristics of the gold mineralization and to produce gold dore from samples to generate cash flow. During 2014, the company began the construction of its 32,000-metric-ton-per-year-capacity heap-leach gold-recovery facility at the mine, which included four leach pads. In January, LAMI announced the completion of three of the four planned leach pads and suspension of the construction of the fourth leach pad in order to minimize expenditures during operational trials. The company also implemented a new cost-reduction program to conserve cash resources while seeking investors to advance the project. LAMI expected to increase its processing capacity at Paso Yobai and to continue exploration work at seven target areas within Paso Yobai in 2016 (Latin American Minerals Inc., 2015, p. 5, 14; 2016, p. 4–5, 7, 8).

Mineral Fuels and Related Materials

Natural Gas and Petroleum.—Amerisur Resources plc of the United Kingdom held 100% interest in five blocks (the Curupayty and San Pedro exploration and production permits and the Coronillo, Espartillar, and Las Palmas prospecting permits) covering an area of about 5.8 million hectares. The company planned to drill the Jaguarete-1 exploration well in the San Pedro Block, which is located in the Parana basin, in April 2016. In 2014, President Energy PLC of the United Kingdom signed a conditional farm-in agreement to farm in up to a maximum of 80% interest in the Hernandarias concession, which is located in the Chaco Region. Under the terms, the company acquired 40% interest and was entitled to earn an additional 40% interest by investing in the block within the next 4 years. During the year, President Energy acquired 607 km of new two-dimensional seismic survey data for the Hernandarias Block and reported that the survey identified several drillable Paleozoic prospects at depths of between 2,500 and 3,000 meters (m), which is some 1,000 m shallower than the Lapacho and the Jacaranda wells drilled in 2014. The Boqueron prospect was identified to be the first candidate for an exploration well. As of September, the company reported estimated prospective resources of 302 million barrels of oil equivalent (President Energy PLC, 2015a, b; 2016, p. 3; Amerisur Resources plc, 2016, p. 11).

Uranium.—In May, Uranium Energy Corp. of the United States announced that its Yuty in situ recovery (ISR) project had received approval from the MOPC to advance the project from the exploration phase to the extraction phase. The company held 100% interest in the Coronel Oviedo and Yuty ISR uranium projects. Yuti is located within the western part of the Parana basin, which hosts several uranium deposits in Brazil, such as the Amorinopolis and the Figueira deposits. The area is underlain by upper Permian-Carboniferous sedimentary rock. The project would initially enter into the exploration phase for a maximum of 6 years, after which time the MOPC grants a mineral concession to an operator; during the 6-year period, the company must advance and demonstrate a viable project. The exploration phase would be followed by the mining phase for a maximum of 20 years, plus one 10-year extension, during which time an environmental licensing process may begin. As of 2011, measured and indicated mineral resources at Yuty were estimated to be 7.8 million metric tons (Mt) at an average grade of 0.052% triuranium octoxide (U_3O_8), and inferred mineral resources were estimated to be 2.14 Mt at an average grade of 0.047% U_3O_8 (BRS Inc. and ExplorMine Consultants, 2011, p. 60; Uranium Energy Corp., 2015; U.S. Securities and Exchange Commission, 2015, p. 3, 57–59).

Outlook

Paraguay's GDP growth rate was forecasted to be 2.9% for 2016 (International Monetary Fund, 2016, p. 38). The country will continue to rely on imports of crude petroleum and refinery products to meet its demand. Exploration for mineral fuels is expected to continue in 2016. In the long term, if plans to develop the country's gold and uranium deposits come to fruition, the mineral sector is likely to increase in importance and to attract foreign direct investment.

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URUGUAY

Uruguay's mineral industry was dominated by the production of crude steel, gold, industrial minerals, and petroleum refinery products. Industrial minerals produced in the country included cement, clay, crushed stone, dolomite, granite, and limestone. The country also produced natural gemstones, such as agate and amethyst. In 2015, the country's GDP increased by about 1.0% compared with a revised 3.2% in 2014. Production of petroleum refinery products accounted for 1.2% of the total GDP, and mining and quarrying accounted for about 0.2%. Uruguay was not a petroleum-producing country and had no proven hydrocarbon reserves. The country relied completely on crude petroleum and natural gas imports; in 2015, imports of crude petroleum were about 14.7 Mbbl and those of natural gas were about 55 million cubic meters. Argentina supplied all the country's natural gas imports through the Gasoducto del Litoral (CR. Federico Slinger) and the Gasoducto Cruz del Sur pipelines. Renewable energy sources accounted for about 93% of the country's electric power in 2015, and fossil fuels accounted for about 7%. Hydroelectric energy accounted for 59% of the country's renewable energy sources (Banco Central del Uruguay, 2016; Ministerio de Industria, Energía y Minería, 2016a, p. 3, 5, 7).

Government Policies and Programs

The Ministerio de Industria, Energia y Mineria [Ministry of Industry, Energy and Mining] (MIEM) is the Government agency responsible for the administration of the energy, industry, mining, and telecommunications sectors. The Direccion Nacional de Mineria y Geologia [National Directorate of Mines and Geology], which is part of the MIEM, is the authority that regulates mining activities in the country and issues mineral licenses. The mining sector is regulated by law No. 15.242 of January 8, 1982 (Código de Minería) [Mining Code], which was modified by law No. 18.813 of September 23, 2011 (Reforma del Código de Minería) [Reform of the Mining Code], and law No. 17.283 (Ley General de Protección Ambiental) [General Environmental Protection Law]. The Administración Nacional de Combustibles, Alcoholes y Portland (ANCAP) is a Government-owned holding company created by law No. 8764 of October 15, 1931. Among its other duties, the ANCAP is involved in the production of alcohol, petroleum derivatives, and portland cement. The exploration and exploitation of hydrocarbons in the country is regulated by law No. 14.181. Under the law, all deposits of oil and associated substances located in the country belong to the state and can be explored and extracted by the state. A new large-scale mining law No.19.126 (Activitad Mineria de Gran Porte [Large-Sized Mining Activity] became effective on September 25, 2013. The new law establishes taxes and environmental standards for potential large-scale mining projects. Uruguay also continued to be a member of MERCOSUR (Republica Oriental del Uruguay, 1982, 2000; Administración Nacional de Combustibles, Alcohol y Portland, 2016; Mercado Común del Cono Sur, 2016; Ministerio de Industria, Energía y Minería, 2016b; Uruguay XXI, 2016, p. 7)

Production

Data on mineral production are in table 1.

Structure of the Mineral Industry

Orosur Mining Inc. (OMI) of Canada was Uruguay's only producer of gold, and it operated the San Gregorio project located in the Department of Rivera about 450 km north of the capital city of Montevideo. La Teja refinery, which was located near the city of Montevideo, was the country's sole petroleum refiner. Table 2 is a list of major mineral industry facilities.

Mineral Trade

According to Uruguay XXI, Uruguay's exports of goods (including those from duty free zones) decreased by about 12% to $9.0 billion from $10.1 billion. The decrease was mainly attributed to the decrease in commodity prices, Argentina's economic stagnation, the slowdown of China's economy, and the economic recession in Brazil. Brazil and China continued to be the country's major export partners, receiving 23% and 14% of Uruguay's exports, respectively. In 2015, however, exports to Brazil decreased by 29%, and those to China, by 9%. The total value of Uruguay's imports, excluding petroleum oils and (or) derivatives, decreased by 11% to about $8.5 billion in 2015. The imports of mills and supplies for wind power generation increased by more than 100% in 2015. The increase was attributed to the process of change in the country's energy matrix, which focuses on energy generation based on renewable energy (Uruguay XXI, 2015, p. 2–3, 6–8).

Uruguay's exports to the United States were valued at about $605 million in 2015 (including $281,000 in cement, sand, and stone and $180,000 in coal and related fuels) compared with about $457 million in 2014. Imports from the United States were valued at about $1.3 billion in 2015 compared with about $1.6 billion in 2014. Petroleum products accounted for about $27.3 million of these imports in 2015, and fuel oil, about $13.4 million (U.S. Census Bureau, 2016a, b).

Commodity Review

Metals

Gold.—During fiscal year 2015 (June 1, 2014, to May 31, 2015), Orosur Mining Inc. (OMI) mined the Arenal Deeps underground mine and several open pits (Laureles, Sobresaliente, Picaflor, Vaca Muerta, Vetas, and Zapucay) and produced 1,664 kilograms (kg) of gold compared with 1,875 kg in fiscal year 2014. The Arenal Deeps underground operation accounted for about 55% of the ore mined during the fiscal year. As of May 31, the total proven and probable mineral reserves at San Gregorio were reported as 2.74 Mt at an average grade of 1.80 grams per metric ton (g/t) gold, and the total measured and indicated mineral resources were reported as 19.78 Mt at an average grade of 1.18 g/t gold. San Gregorio's inferred mineral resources were reported as 2.38 Mt at an average grade of 1.10 g/t gold (Orosur Mining Inc., 2015, p. 26, 41–42, 44, 50).

Mineral Fuels and Related Materials

Natural Gas and Petroleum.—The Government-owned companies Administracion Nacional de Usinas y Transmisiones Electricas and ANCAP (through its subsidiary Gas Sayago S.A.) continued with their plans to develop Proyecto GNL del Plata. The project included an offshore terminal (to be located about 2.5 km from the shoreline at Punta Sayago), a floating storage and a regasification unit, and a jetty, all of which would be protected by a 1.5-km breakwater. The terminal would have a storage capacity of about 263,000 cubic meters and a regasification capacity of about 10 million cubic meters per day of natural gas (Gas Sayago S.A., 2013, p. 9; 2016).

According to BP p.l.c. of the United Kingdom, the company notified ANCAP in May that the interpretation of seismic data acquired for three hydrocarbon offshore blocks (Blocks 11 and 12 in the Pelotas basin and Block 6 in the Punta del Este basin) had not resulted in identification of viable prospects and, as a result, the company relinquished its 100% interest in all three blocks. In November, Exxon Mobil Corp. of the United States acquired a 35% interest in the deepwater Block 14, in which Total S.A. of France was the operator and held a 65% interest. Block 14 is located in the Pelotas basin and covers an area of 6,690 square kilometers (km^2) in water depths of between 1,980 and 3,500 m. Drilling operations at the Raya-1 exploration well within the block were planned for 2016 (BP p.l.c., 2015, p. 214; 2016, p. 222; Exxon Mobil Corp., 2016, p. 23; Statoil ASA, 2016).

As a result of the Uruguay Round II bidding process, ANCAP and the MIEM planned to launch the Uruguay Round III tender in 2016, which would include about 17 hydrocarbon exploration blocks ranging in size from 2,500 km^2 to 6,500 km^2. The 17 blocks would include 5 blocks in shallow waters (up to 100 m); 8 blocks in deep waters (between 100 and 3,500 m), including blocks previously leased and relinquished by BP and Yacimientos Petroliferos Fiscales of Argentina; and 4 blocks in ultradeep waters (more than 3,500 m) (BP p.l.c., 2015, p. 222; 2016; Exploration and Production of Hydrocarbons, 2016).

Outlook

Uruguay's GDP was forecasted to increase by 1.4% in 2016. According to Uruguay XXI, the country's exports of goods will decrease slightly in 2016, by 1.6%, but are expected to increase by 3.1% in 2017. The Government is planning to continue its efforts to increase interest in offshore and onshore hydrocarbon exploration. In the short term, the country is expected to continue to rely on crude petroleum and natural gas imports to meet domestic demand. The presence of international companies engaged in hydrocarbon exploration also suggests that foreign investment in the mineral fuels sector is likely to increase in the coming years (Uruguay XXI, 2015, p. 9; International Monetary Fund, 2016, p. 38).

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TABLE 1

PARAGUAY AND URUGUAY: PRODUCTION OF MINERAL COMMODITIES[1]

(Metric tons unless otherwise specified)

Country and commodity		2011	2012	2013	2014	2015[e]
PARAGUAY[2]						
Cement, hydraulic[e]	thousand metric tons	650 [3]	650	650	650	650
Iron and steel:[4]						
Pig iron		42,000	67,000	69,000	71,000	71,000
Steel, crude		30,000	44,000	45,000	47,000	48,000
Stone, crushed and broken[e]	thousand metric tons	14,795 [3]	14,800	14,800	14,800	14,800
URUGUAY[5, 6]						
Bentonite		1,210	5,530	8,990	7,800	8,000
Cement, hydraulic	thousand metric tons	968 [7]	872 [7]	850 [e]	820 [e]	730
Clay, unspecified		31,350	26,670	19,558	23,120	23,000
Dolomite		13,160	19,410	23,010	19,666	20,000
Gold, mine output[3, 8]	kilograms	1,740	1,725	2,022	1,875 [r]	1,664
Granite		5,620	2,850	4,718	2,900	3,000
Iron and steel:						
Iron ore		8,360	9,500	9,978	15,050	15,500
Steel, crude[4]		81,000	78,000	91,000	93,000	96,000
Limestone	thousand metric tons	1,489	1,458	1,506	1,474	1,500
Natural gemstones, agate and amethyst		20,490	20,380	20,900	16,200	16,000
Stone, crushed	thousand metric tons	1,472	3,025	1,949	1,552	1,600
Petroleum, refinery products[3, 9]	thousand 42-gallon barrels	10,082	14,564	15,731	14,891	14,862

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

[1]Table includes data available through July 13, 2016.

[2]In addition to the commodities listed, construction materials (clay, limestone, marble, and sand) were produced, but available information was inadequate to make reliable estimates of output.

[3]Reported figure.

[4]Source: World Steel Association.

[5]In addition to the commodities listed, feldspar, marble, quartz, and talc were produced in small quantities.

[6]Source: Ministerio de Industria, Energía y Minería (MIEM) - Dirección Nacional de Minería y Geología (DINAMIGE), Produccion nacional de minerales, por año, segun mineral 2010–2014. Data are for fiscal year beginning on April 1 and ending on March 31 of the year stated.

[7]Source: Federacion Interamericana del Cemento, Statistical Report 2013.

[8]Source: Orosur Mining Inc. Data are for fiscal year ending on May 31.

[9]Source: Administración Nacional de Combustible, Alcohol y Portland (ANCAP). Numbers were converted to 42-gallon barrels (bbl) from thousand cubic meters using the U.S. Energy Information Administration conversion factor of 1 cubic meter = 6.289812 bbl.

TABLE 2
PARAGUAY AND URUGUAY: STRUCTURE OF THE MINERAL INDUSTRIES IN 2015

(Thousand metric tons unless otherwise specified)

Country and commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity[e]
PARAGUAY				
Cement		Industria Nacional del Cemento	Puerto Vallemi plant, about 350 kilometers northwest of Asuncion	1,060
Do.		do.	Villeta plant, about 25 kilometers south of Asuncion	730
Do.		Yguazu Cementos S.A. (Intercement Brasil S.A., 51%, and Concret-Mix S.A., 49%)	Villa Hayes plant in Presidente Hayes Department	400
Petroleum, refinery products	thousand 42-gallon barrels	Petróleos Paraguayos	Villa Elisa refinery at Villa Elisa municipality	2,700 [1]
Steel		Aceros del Paraguay S.A. (ACEPAR)	Villa Hayes, about 25 kilometers northeast of Asuncion	150
URUGUAY				
Cement		Cementos Artigas S.A. (Votorantim Cimentos, 51%, and Cementos Molins S.A., 49%)	Mine and clinker plant in Lavalleja Department	500
Do.		Cementos del Plata S.A. (Administración Nacional de Combustibles, Alcohol, y Portland, 99.74%)	Paysandu plant in Paysandu Department and Minas plant in Lavalleja Department	530
Gold	kilograms	Minera San Gregorio S.A. (Orosur Mining Inc., 100%)	Mina de San Gregorio in Rivera Department, about 450 kilometers north of Asuncion	2,000
Iron and steel		Gerdau Laisa S.A.	Plant at Montevideo	90
Petroleum, refinery products	thousand 42-gallon barrels	Administración Nacional de Combustibles, Alcohol, y Portland	La Teja oil refinery near Montevideo	18,000

[e]Estimated. Do., do. Ditto.

[1]Production operations were suspended in 2005. Evaluation of the feasibility of restarting the refinery is ongoing.