



2013 Minerals Yearbook

KOSOVO

THE MINERAL INDUSTRY OF KOSOVO

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Kosovo is a relatively young country in the Balkan Peninsula. It has substantial mineral resources of lead, lignite, silver, and zinc that remain to be explored further or extracted. The varied geology of Kosovo also contains identified deposits of aggregates and construction materials, bauxite, chromium, magnesite, and nickel, among others (Independent Commission for Mines and Minerals, 2005b; Ministry of Economic Development, 2012b). In 2013, the production of most minerals continued to be small by regional and world standards. Almost all mineral industry activity had ceased in the late 1990s during the armed conflict between ethnic Albanians and Serbs. Production of most mineral commodities resumed in the mid-2000s and increased significantly in recent years, albeit from a relatively low base. With the exception of cement, ferronickel, and steel plants, which received foreign direct investment from Greece, Israel, and Russia, respectively, other mines and production facilities lacked the funding and technological upgrades necessary to revamp and (or) increase production.

The former Serbian Province of Kosovo became independent in 2008 after having been administered by the United Nations' Interim Administration Mission in Kosovo since 1999. The Government of Kosovo had since implemented new laws to promote the development of the mineral sector of the country, particularly by attracting foreign investment (Ministry of Economic Development, 2012a; Investment Promotion Agency of Kosovo, 2013). In 2011, law No. 03/L-163 on Mines and Minerals was passed to create zones of special interest for key minerals and to encourage mineral exploration and extraction. This law on mining investment was supplemented in 2013 by the New Mining Law, which simplified the process for obtaining a mining license. In addition, the 2011 Public Private Partnership (PPP) law No. 2011/04-L-045 further opened major Kosovar sectors to foreign investment by harmonizing bidding procedures and investment regulations with the laws and regulations of the European Union (Republic of Kosovo Assembly, 2013; U.S. Department of State, 2013). In 2013, a new law on foreign investment (law No. 2013/04-L-220) defined fundamental rights and established ownership guarantees for foreign investors in accordance with international laws and standards (Karadaku, 2012a; Republic of Kosovo Assembly, 2013). The resulting change in the business climate in 2013 attracted greater inflows of foreign investment to the country, but the mineral industry received less of this new investment than other industries (Karadaku, 2013).

The following two Government agencies are broadly responsible for the mineral sector in Kosovo: the Independent Commission for Mines and Minerals (ICMM) and the Department of Energy and Mining within the Ministry of Economic Development. The ICMM is an independent agency that regulates the mineral industry. It is in charge of the issuance, transfer, suspension, and revocation of exploration

and mining licenses and permits in Kosovo (Independent Commission for Mines and Minerals, 2005a). The Ministry of Economic Development, on the other hand, is responsible for formulating policies, strategies, and the legislative framework for mine development and for promoting new mineral research and exploitation in the country (Investment Promotion Agency of Kosovo, 2013). A third agency, the Privatization Agency of Kosovo, also has an important function in the mineral sector because it is in charge of privatizing state-owned enterprises by issuing calls for tenders, including for major metal and other mineral production plants (Privatization Agency of Kosovo, 2013a).

Minerals in the National Economy

The International Monetary Fund estimated that Kosovo's real gross domestic product increased by 2.54% in 2013 compared with that of 2012 (International Monetary Fund, 2014). The nominal GDP in 2013 was \$6.96 billion, which was up from \$6.45 billion in the previous year (World Bank, The, 2014).

The value of Kosovo's total exports in 2013 was €293.9 million (\$402.6 million), and the value of its total imports was €2.444 billion (\$3.348 billion). Mineral commodities were the leading export and import goods of the country. Industrial minerals, lead, ferronickel, and zinc continued to be significant sources of export revenue for Kosovo's economy. Base metals and articles thereof remained the leading export category, in terms of value, and totaled about €144 million (\$197.3 million¹), or about 49% of the total value of all exports. Exports of mineral products, which included industrial minerals, mineral fuels, and metal ores, but not processed metals, were valued at €48.2 million (\$66 million) and made up about 16% of the total value of all exports. Mineral products were the leading import category and were valued at about €475 million (\$650.7 million), or about 19% of the total value of all imports. Imports of base metals and articles thereof were valued at €247.6 million (\$339.2 million) and made up about 10% of total imports (Kosovo Agency of Statistics, 2013).

Production

Total production numbers of lead concentrate and zinc concentrate have been revised upward for the years 2009 through 2013 owing to the availability of new output data for one of the two sections of the Trepca Complex located near Mitrovica in northern Kosovo. In 2013, it was reported that the northern section of the divided Trepca Complex annually produced 11,000 metric tons (t) of lead concentrate and almost 8,000 t of zinc concentrate, which represented only 15% of capacity (Savik, 2013). These figures have now been added

¹Where necessary, values have been converted from euro area euros (€) to U.S. dollars (US\$) at the rate of €0.73=US\$1.00 for 2013.

to production numbers reported by the Kosovo Government-controlled southern section of the mine.

The production of lead and zinc ore in the southern portion of the Trepca Complex continued to show positive growth in 2013, increasing by nearly 11%. Production from the Stan Terg Mine increased by 11% to 139,459 t in 2013 from 125,915 t in 2012. Production from the Artana Mine increased by 24% to 46,785 t in 2013 from 37,668 t in 2012 (Privatization Agency of Kosovo, 2014, p. 48–49). The Trepca Complex as a whole operated at only one-fifth of its production capacity in 2012 (U.S. Agency for International Development, 2013, p. 11).

Production figures for lead and zinc metal have been revised to zero for the series and removed from table 1. Production had been reported in 2009, but it is now known that no lead or zinc metal had been produced since 1999.

Production of nickel ore increased by 64%; Ni content of ore, by 73%; zinc concentrate, by 26%; lead concentrate, by 15%; lead ore, by 12%; lead content of ore, by 10%. Dunite output increased nearly 19 times. Marl output increased by 221%; limestone, by 90%; silica sand, by 22%, and sand and gravel, by 11%. On the other hand, andesite production decreased to zero, and pumice output remained at zero. Clay output decreased by 9%, and ferronickel output, which was a major source of export revenue, decreased by 4% (table 1).

Structure of the Mineral Industry

The leading private mineral production companies were Sharrcem Sh.p.k. (cement), which was owned by Titan Group of Greece; Newco Ferronikeli (ferronickel), which was owned by Cunico Resources NV of Israel; and Llamkos GalvaSteel (steel), which was owned by Core Group of Russia. All three facilities had foreign ownership as a result of privatization in 2010, 2006, and 2011, respectively.

Steps were first taken to begin privatization of the Trepca Complex in 2011. The initial efforts focused on selling seven of Trepca's facilities, but the privatization of these assets was put on hold in 2012 owing to complications from unclear ownership stakes, unsettled debts, and opposition to the sale and transfer of ownership by the Government of Serbia, which did not recognize Kosovo's independence (Karadaku, 2012b; Privatization Agency of Kosovo, 2012, p. 17; 2013b, p. 15–16). The Privatization Agency of Kosovo continued to work on the reorganization of the Trepca Complex in 2013. The agency announced a public tender in November for professional service providers to prepare the Trepca reorganization plan, which would be submitted to the Supreme Court of Kosovo in July 2014 (Privatization Agency of Kosovo, 2014, p. 47).

In May 2013, Serbia signed an agreement with a U.S. consortium to invest in the Serbian-controlled section of the mine complex in order to increase mine output (B92.net, 2013). The Privatization Agency of Kosovo protested the action by issuing an official letter to the authorities that administer the northern portion of the Trepca Complex, declaring the agreement to be in contradiction to Kosovo's applicable laws (Privatization Agency of Kosovo, 2014, p. 47).

Table 2 is a list of major mineral industry facilities.

Commodity Review

Metals

Chromium.—Arsi Sh.p.k. Ltd. of Albania began production of chromite near Llapceve in 2012, with a projected goal of producing 100,000 t/yr. It also held a number of exploration licenses in Brezovice, Crepule, Hasalar, Qafe e Prushit, Qerret, and Rahovec. The company was the only active chromite exploration company in Kosovo, and it claimed to own 80% of the identified chromite deposits in Kosovo (Arsi Sh.p.k., 2013).

Ferroalloys.—Newco Ferronikeli, which was the only producer of ferronickel in Kosovo, reduced output by 4% in response to lower world demand (Cunico Resources, N.V., 2013). The company ran only one of two kilns in its Glllogovac plant (U.S. Agency for International Development, 2013, p. 11).

Iron and Steel.—Llamkos GalvaSteel reported that 120,000 t of semifinished galvanized steel was produced by its plant in Vushtrri (Llamkos GalvaSteel, 2013). Core Group, which was the owner of Llamkos GalvaSteel, announced in February that it would expand its production range in Vushtrri by building a steel-recycling mill with the capacity to convert 210,000 t/yr of billets into debar (deformed reinforcing bars) using a 40-metric-ton-per-hour reheating furnace, a rolling-mill ladle car, a water-quenching system, and shearing and bundling equipment. Llamkos GalvaSteel contracted the Turkish steel plant builder and supplier CVS Makina to do the work. The construction of the recycling plant was expected to take 15 months, and rebar production was expected to be launched in the spring of 2014 (Steel Business Briefing, 2013; SteelOrbis, 2013).

Industrial Minerals

Cement.—Sharrcem Sh.p.k produced a reported 535,000 t of cement at its Hani Elezit factory in 2012, and output in 2013 is estimated to have remained the same because no change in production was reported (table 1). The plant had a total capacity of 835,000 t/yr, which means that it was operating at 64% of capacity (U.S. Agency for International Development, 2013, p. 11).

Stone, Dimension.—Fox Marble Holdings plc of the United Kingdom, which was the leading marble quarrying and extraction company in Kosovo, announced in October that it had transitioned from the extraction phase for marble to the supply and distribution phase. The dimensional stone company had seven quarries under license in Kosovo, three of which were operational in 2013. These quarries were located in Cervenilla, Malesheva, and Syrigane. Fox Marble reported the discovery of substantial amounts of high-quality marble in its new Suhogerll quarry. The company continued the development of its own processing plant in Kosovo, which was expected to be completed in the first quarter of 2014. Fox Marble also reported that it had made its first sale of marble from its quarries to customers in the United Kingdom and Lebanon (Fox Marble Holdings plc, 2013, 2014)

Mineral Fuels

Coal.—Lignite continued to be the major source of power in Kosovo. The Kosovo Energy Corp. (KEK) operated the

Bardh and the Mirash coal mines. About 98% of the country's electricity was generated by two old lignite-fired powerplants—Kosovo A and Kosovo B. The World Bank proposed the construction of a new 600-megawatt-capacity lignite plant (Kosovo C), the closing of Kosovo A, and the rehabilitation of Kosovo B; however, this plan was met with opposition from certain citizen groups and environmental organizations who were opposed to reliance on coal-based energy generation and advocated for clean energy in the country (Sierra Club, 2012; Salem, 2013; World Bank, The, 2013). No construction took place in 2013.

Outlook

Kosovo is expected to remain a modest producer of mineral commodities, but it is likely to continue increasing its mineral output as development of the mining infrastructure advances and as foreign investment in the mineral industry increases. Because Kosovo exports most of its mineral products, the health of the world economy and the level of foreign demand will also be important factors in the development of Kosovo's mineral industry. The Trepca Complex could make Kosovo a regionally significant producer of lead and zinc once again if significant investment is received and its ownership issues are resolved. Similarly, Kosovo's significant reserves of lignite could make it a leading producer of coal in Europe as well as in the Balkans. The country faces energy shortages and ongoing environmental pollution because of its reliance on old lignite-fueled powerplants. Increased mineral production would also require construction of new powerplants, increased energy production, and (or) the use of alternative sources of energy.

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TABLE 1
KOSOVO: PRODUCTION OF MINERAL COMMODITIES¹

(Metric tons unless otherwise specified)

Commodity ²	2009	2010	2011	2012	2013	
METALS						
Chromite (Cr ₂ O ₃ , 26%)	--	--	--	2,000	NA	
Ferroalloys, ferronickel:						
Gross weight ^c	28,700 ^r	38,200 ^r	41,000 ^r	30,200 ^r	28,900	
Ni content of ferronickel	6,603 ^r	8,790 ^r	9,435 ^r	6,944 ^r	6,653	
Lead and zinc:						
Ore, gross weight	158,137	185,842	233,115	225,490	252,768	
Lead content of ore	6,500	7,700	7,100	6,700	7,400	
Zinc content of ore	5,600	6,400	6,600	6,600	7,100	
Concentrate:						
Lead concentrate:						
Gross weight	15,285 ^r	19,232 ^r	18,471 ^r	19,298 ^r	20,025	
Pb content	10,600 ^r	13,400 ^r	11,200 ^r	12,300 ^r	14,200	
Zinc concentrate:						
Gross weight	13,332 ^r	16,678 ^r	15,409 ^r	17,695 ^r	18,417	
Zn content	6,300 ^r	7,900 ^r	6,000 ^r	7,000 ^r	8,800	
Nickel:						
Ore, wet	918,709	779,506	683,855	379,151	623,504	
Ni content of ore	10,500	9,100	7,700	4,400	7,600	
Steel	thousand metric tons	--	--	--	120,000 ^e	120,000 ^e
INDUSTRIAL MINERALS						
Andesite	cubic meters	NA	NA	NA	34,057	--
Basalt	do.	--	--	--	8,743	9,705
Cement ^c	thousand metric tons	600	600	600	535 ^r	535
Clay ³		46,400	22,900	38,800	55,300 ^r	50,100
Dunite	cubic meters	--	--	--	95,284	1,783,317
Limestone	do.	2,164,589	2,606,047	3,282,964	2,666,449 ^r	5,070,407
Marl	do.	291,829	302,630	259,616	128,161	411,073
Pumice and related materials, volcanic tuff ^e	do.	58,788 ⁴	60,000	60,000	-- ^r	--
Sand and gravel, excluding glass sand	do.	46,085	18,533	32,819	22,749 ^r	25,199
Silica sand (glass sand)	do.	20,181	25,178	19,711	22,490	27,371
MINERAL FUELS AND RELATED MATERIALS						
Lignite	thousand metric tons	7,839	7,958	8,212	8,028	8,219

^eEstimated; estimated data are rounded to no more than three significant digits. ^rRevised. do. Ditto. NA Not available. -- Zero.

¹Table includes data available through July 1, 2014.

²In addition to the commodities listed, other aggregates and construction materials were thought to have been produced, but available information is inadequate to make reliable estimates of output.

³Estimate based on reported production in cubic meters: 2009—78,813 (revised); 2010—38,925; 2011—65,930; 2012—94,008 (revised); and 2013—85,134.

⁴Reported figure.

TABLE 2
KOSOVO: STRUCTURE OF THE MINERAL INDUSTRY IN 2013

(Thousand metric tons)

Commodity	Major operating companies and major equity owners	Location of main facilities	Annual capacity ^e
Bauxite	Bauxite Mine Volljak (Government owned)	Grebnik Mine, about 50 kilometers east of Pristina and 17 kilometers north of Orahovac	NA
Cement	Sharrcem Sh.p.k. [Sharr Beteiligungs GmbH (Titan Group)]	Hani Eleziti, on border with Macedonia	835
Chromite	Arsi Sh.p.k.	Llapceve, about 12 kilometers north of Rahovec	NA
Coal, lignite	Kosovo Energy Corp. J.S.C. (Government owned)	Bardh and Mirash Mines, just west of Pristina	NA
Lead and zinc:			
Ore	Trepca Complex (Government owned)	Stan Terg Mine	NA
Do.	do.	Crnac Mine, northern Kosovo	NA
Do.	do.	Artana Mine at Novo Brdo	NA
Do.	do.	Belo Brdo Mine, northern Kosovo	NA
Do.	do.	Hajvalia Mine, 8 kilometers southeast of Pristina	NA ¹
Concentrate	do.	Concentrator at Tuneli i Pare, near Mitrovica	NA
Do.	do.	Concentrator at Kizhnica, about 8 kilometers southeast of Pristina	NA
Do.	do.	Concentrator at Leposavic in northern Kosovo	NA
Do.	Trepca Complex (Serbian controlled)	Concentrator in northern Mitrovica	126
Metal:			
Lead	do.	Lead smelter at Zvecan	NA
Zinc	do.	Zinc smelter at Mitrovica	NA
Magnesite ²	XIM Strezoc Magnesite Mine LLC ("Iminggrup mgo" Sh.p.k.)	Mine and processing plant in Strezovce, Kamenica municipality	NA
Do.	Mine and Industry of Magnesite Goleshi LLC ("Iminggrup mgo" Sh.p.k.)	Magure, Lipljan municipality	NA
Nickel:			
Ore	Newco Ferronikeli (Cunico Resources NV)	Mines at Chikatovo (Dushkaja and Suke Mines) and Glavitca	NA
Metal ³	do.	Ferronickel plant at Gllogovac, about 20 kilometers west of Pristina	12
Steel	Llamkos GalvaSteel (Core Group)	Vushtrri, northeastern Kosovo	150

^eEstimated; estimated data are rounded to no more than three significant digits. Do., do. Ditto. NA Not available.

¹The Hajvalia Mine was flooded and had not produced any lead-zinc ore since the late 1990s.

²There were no active magnesite mines in Kosovo in 2013.

³Nickel in ferronickel.