



# 2015 Minerals Yearbook

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**BANGLADESH [ADVANCE RELEASE]**

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# THE MINERAL INDUSTRY OF BANGLADESH

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In 2015, the mineral industry of Bangladesh produced mainly cement, coal, iron and steel, natural gas, petroleum, salt, and stone. In 2015, the Government was in the process of drafting a coal policy that would set the standards and rules for development of the coal extraction sector. Updated details regarding the progress or expected completion of this policy document were not available. The country lacks reserves of metallic minerals but has economic deposits of natural gas. According to the Government of Bangladesh, the Bay of Bengal had great potential for undersea resources, predominantly natural gas. For many years, Bangladesh had limitations on the exploration of its offshore area owing mainly to maritime boundary disputes with neighboring Burma and India. The Government prioritized resolving the boundary disputes in order to open up its offshore entitlements for hydrocarbon exploration by foreign investors. In 2012, Bangladesh decided to settle the boundary dispute with Burma by agreeing to accept the ruling made by the International Tribunal for the Law of the Sea. In July 2014, an arbitral tribunal established under Annex VII of the United Nations Convention on the Law of the Sea (UNCLOS) delimited the maritime boundary between Bangladesh and India (ITLOS) (table 1; Burke, 2014; Deutsche Welle, 2014; Bangladesh Oil, Gas and Mineral Corp., 2015, p. 24).

## Minerals in the National Economy

According to the Central Bank of Bangladesh, in fiscal year 2015 (July 1, 2014, to June 30, 2015), mining and quarrying accounted for about 1.6% of the country's gross domestic product (GDP), which was the same as in 2014; the construction sector accounted for about 7.2% of the country's GDP compared with 6.8% in fiscal year 2014. Total foreign trade increased by 3% to \$68.4 billion from \$66.3 billion in 2014. The country's total exports were valued at about \$30.7 billion in 2015 compared with \$29.8 billion in 2014, which was an increase of 3%; similarly, the total value of imports in 2015 increased by 3% to \$37.7 billion from \$36.6 billion in 2014. Imports of iron, steel, and other base metals (unspecified) were valued at \$3.3 billion, which was an increase of about 13% compared with that of 2014. Imports of crude petroleum were valued at \$316 million, and that of clinker was valued at \$638 million (Central Bank of Bangladesh, 2016, tables I.1, I.3, and IV.3).

## Production

Bangladesh produced small amounts of industrial minerals and processed products. Increases in production were reported for crushed granite (397%), iron and steel metal (37%), petroleum refinery products (10%), and natural gas (9%). The production trend for natural gas had been positive for the past 5 years. The increase in the production of granite was owing to increased efficiencies at the Maddhapara granite mine.

Increases in the production of steel billets were mainly owing to the commissioning of a new billet factory and the capacity expansion of another facility. Decreases in production reported for coal (29%) were owing mainly to depleting resources; however, feasibility studies were underway to increase production (table 1; Bangladesh Oil, Gas and Mineral Corp., 2015, p. 24, 50; BSRM Steels Ltd., 2015, p. 13).

## Structure of the Mineral Industry

Bangladesh Oil, Gas and Mineral Corp. (Petrobangla) is the Government entity that is responsible for the exploration, production, transmission, and distribution of natural gas and petroleum in Bangladesh. Petrobangla was also in charge of the extraction of coal and granite. Oversight of the exploration for minerals, however, was the responsibility of the Geological Survey of Bangladesh (Bangladesh Oil, Gas and Mineral Corp., 2015, p. 7, 17–18, 55).

The exploration and production of coal and granite were performed by Petrobangla subsidiaries Barapukuria Coal Mining Co. Ltd. (BCMCL) and Maddhapara Granite Mining Co. Ltd. (MGMCL), respectively. Eastern Refinery Ltd. (ERL), which was a subsidiary of Bangladesh Petroleum Corp. (BPC), was Bangladesh's sole petroleum refining company (Bangladesh Oil, Gas and Mineral Corp., 2015, p. 50; Eastern Refinery Ltd., 2016).

The major Government-owned gas-producing companies, which were under Petrobangla, were Bangladesh Gas Fields Co. Ltd. (BGFCL), Bangladesh Petroleum Exploration and Production Co. Ltd. (BAPEX), and Sylhet Gas Fields Ltd. (SGFL). Altogether, the Government-owned gas-producing companies produced 43.9% of the country's total gas production for fiscal year 2015, and the other 56.1% was produced by Chevron Corp. of the United States and KrisEnergy Bangladesh Ltd. (a subsidiary of KrisEnergy Ltd. of the Cayman Islands). In fiscal year 2015, 20 gasfields were in production for a total of 98 flowing wells. The gasfields were operated by BAPEX (7), BGFCL (5), SGFL (4), Chevron (3), and KrisEnergy (1) (Bangladesh Oil, Gas and Mineral Corp., 2015, p. 19).

The BSRM Group was composed of various companies that produced steel billets and steel products for construction. As part of the BSRM Group, Bangladesh Steel Re-Rolling Mills Ltd. (BSRM Ltd.) was the first fully automated re-rolling mill built in Bangladesh; it has been in operation since 1952 and produced high-quality steel products. Other companies held by the BSRM Group were BSRM Iron and Steel Co. Ltd. (BISCO), and BSRM Ltd. Steel Melting Works (SMW). BSRM Ltd. held a 31.19% interest in BSRM Steels Ltd. (BSL), and a 44.97% interest in BSRM Steel Mills Ltd. (BSML). Table 2 is a list of major mineral industry facilities in Bangladesh (Bangladesh Steel Re-Rolling Mills Ltd., 2015, p. 15; BSRM Steels Ltd., 2015, p. 13, 46).

## Commodity Review

### Metals

**Iron and Steel.**—Steel production in Bangladesh had surged in recent years in line with the Government's plans to improve the country's infrastructure. Demand for steel products in the country had increased in such sectors as transportation (construction of bridges and culverts), home building and real estate, and the power sector. The steel industry also faced challenges, however, such as the difficulty of maintaining production facilities operating at capacity level owing to gas and power shortages, the volatile market prices of billets, inefficient distribution channels, and political unrest in the country. As of 2015, there were about 400 small-scale steel mills in the country (Bangladesh Steel Re-Rolling Mills Ltd., 2015, p. 27, 47).

In 2015, the production of steel billets increased by 37% to 360,520 metric tons (t) from 263,028 t in 2014. The increase in production was mainly owing to the commencement of trial production at BSML, which was the largest induction furnace-based melting plant and the leading producer of steel billets within the BSRM Group. Trial production started in December, and a total of 56,186 t of steel billets was produced; commercial production was planned to start in the first quarter of 2016. Additionally, in 2015, an expansion project at SMW was completed, thus increasing the plant's output to 135,000 metric tons per year (t/yr) of steel billets from 120,000 t/yr. Output from the SMW plant was sold for local consumption (tables 1, 2; Bangladesh Steel Re-Rolling Mills Ltd., 2015, p. 7, 15, 48; BSRM Steels Ltd., 2015, p. 38, 41, 46, 108).

In 2015, the output of steel products in Bangladesh decreased by 2.6% owing mainly to a 1-week shutdown of the BSL plant for emergency maintenance work on the plant's air pollution system. In addition, production slowed during the implementation phase of BSRM Ltd.'s expansion and modernization to increase its plant capacity to 450,000 t/yr of steel products from 120,000 t/yr. The BSRM Ltd. plant started commercial production in December 2015 with a total output of 45,689 t of steel products. Also in 2015, BSL completed an expansion project that increased its annual production capacity to 700,000 t/yr of steel products from 600,000 t/yr (table 1; Bangladesh Steel Re-Rolling Mills Ltd., 2015, p. 7, 15, 39; BSRM Steels Ltd., 2015, p. 13, 41, 142).

### Industrial Minerals

**Cement.**—In November 2015, Confidence Cement Ltd. of Bangladesh announced that it had started planning for an increase of its plant's production capacity to 4,000 metric tons per day (t/d) of cement from 2,000 t/d. The project expansion was scheduled to be completed in 2016 (International Cement Review, 2015).

**Stone, Crushed.**—MGMCL produced granite at Petrobangla's underground mine in the District of Dinajpur. The facility was the main source of construction aggregate in Bangladesh, and the granite produced was mainly sold domestically as construction material. In 2015, granite production at the facility increased by 397% to 931,476 t owing mainly to improvements and expansion of the underground mine, which included roadways and stopes to facilitate granite

extraction. In September 2013, MGMCL signed a contract agreement with the Germania-Trest Consortium (GTC), which allowed the latter to operate, manage, and upgrade the granite mine. In accordance with the agreement, GTC was to develop 12 new stopes within the next 6 years and to produce 9.2 million metric tons of granite during that period. By the end of fiscal year 2015, the company had built two stopes (Bangladesh Oil, Gas and Mineral Corp., 2015, p. 50).

### Mineral Fuels

**Coal.**—In 2016, the BSRM Group planned to address power shortages at its steel facilities by building a 150-megawatt (MW) coal-based powerplant to meet the facilities' power demand. With the powerplant in place, the company planned to achieve uninterrupted electricity supply and increase its production of steel. The company expected to commission the powerplant by 2018. The BSRM Group had already obtained the approval permit from the Government to start building the plant, which was planned to be located in Mirsharai in southeastern Bangladesh (Bangladesh Steel Re-Rolling Mills Ltd., 2015, p. 15, 27, 49, 56; BSRM Steels Ltd., 2015, p. 38).

The Barapukuria coal mine, which was managed by BCMCL, was the first and sole operating coal mine in Bangladesh. The production of coal helped ease the dependence of the country on natural gas. Coal produced from the mine was used mainly for power generation in the country's only coal-fired thermal powerplant; the 250-MW-capacity plant was located near the mine in Barapukuria, Rangpur Division. Coal was also used in the brick industry and by the steel rolling mills. During 2015, BCMCL proposed various initiatives to increase the mine's production and prepared a feasibility study to extend the existing underground mining operation, a feasibility study to develop an open pit coal mine in the northern part of the Barapukuria coal basin, a feasibility study to develop the Dighipara coalfield, and a feasibility study for the extraction of coalbed methane from the Jamalganj coalfield. The feasibility study for the Jamalganj coalfield was expected to be completed in mid-2016. (Bangladesh Oil, Gas and Mineral Corp., 2015, p. 24).

**Natural Gas.**—In 2015, natural gas accounted for about 75% of commercial energy production in the country. The major Government-owned gas-producing companies in the country (BGFCL, BAPEX, and SGFL) produced a total of 11.1 billion cubic meters of natural gas during fiscal year 2015, which was about 43.9% of the country's total gas production. Two of the major international oil companies operating in the country (Chevron, and KrisEnergy) produced 14.2 billion cubic meters of natural gas, or 56.1% of the country's total gas production (Bangladesh Oil, Gas and Mineral Corp., 2015, p. 7, 19).

By 2015, a total of 26 gasfields had been discovered throughout the country for a total recoverable proven and probable gas reserve of about 768 billion cubic meters, of which as much as 50% had already been produced and depleted as of December. As reserves of natural gas continued to deplete and demand continued to increase owing mainly to increased infrastructure development and economic growth, Petrobangla continued with exploration and drilling activities. Discovery of new sources of hydrocarbons, however, had become difficult in the

country. During 2015, Bangladesh's sole national exploration company, BAPEX, planned an extensive exploration and drilling program that included drilling 53 exploration wells and 35 development wells until the year 2021. BAPEX also programmed 3,000 kilometers (km) of an onshore two-dimensional seismic survey to be performed between 2016 and 2019 (Bangladesh Oil, Gas and Mineral Corp., 2015, p. 8–9).

Gas Transmission Co. Ltd. (GTCL), which was under Petrobangla, was the Government-owned company that expanded, maintained, and operated the national gas grid and was in charge of the supply and use of natural gas throughout the country. In fiscal year 2015, GTCL installed about 1,021 km of new gas transmission pipelines of various sizes across the country. As of December 2015, Bangladesh's gas pipeline network encompassed nearly 23,726 km, of which 16,603 km was feeder and service lines; 2,372 km was distribution lines; 2,536 km was transmission lines; and 2,001 km was undefined (Bangladesh Oil, Gas and Mineral Corp., 2015, p. 20, 40).

In 2015, according to Petrobangla, the demand for natural gas was 90.6 million cubic meters per day (reported as 3,200 million cubic feet per day), although the average supply was 77.6 million cubic meters per day (reported as 2,740 million cubic feet per day). Petrobangla estimated a shortage of natural gas of about 14.2 million cubic meters per day (reported as 500 million cubic feet per day). To compensate for the shortage, the Government was importing LNG and planning for the installation of a floating storage and regasification unit to be located 90 km south of Chittagong. In addition, the Government was planning for the construction of a 115-km transmission pipeline to connect Moheshkhali to Foudjarhat in Chittagong. Both projects progressed during 2015 and were expected to be completed by 2017. In 2015, Petrobangla started preparation for the installation of two LNG onshore terminals to be located in Moheshkhali and the Paira Port area. Each of the terminals would have a transmission capacity of 28.3 million cubic meters per day (reported as 1,000 million cubic feet per day) (Bangladesh Oil, Gas and Mineral Corp., 2015, p. 8, 23).

In 2015, four gasfields were operated in Bangladesh by Chevron (Bibiyana, Jalalabad, and Moulvibazar) and KrisEnergy (Bangura) under production-sharing agreements. Bibiyana was the leading supplier of gas to the national grid, providing about 34 million cubic meters per day from 25 wells. Chevron was evaluating the possibility of upgrading the Bibiyana gasfield facility to increase the hydrocarbon recovery rate in order to sustain future production. In 2015, three additional wells were drilled in the Jalalabad gasfield, increasing its total number of wells to seven and its total production capacity to 7.6 million cubic meters per day of gas. The Moulvibazar gasfield produced 1.3 million cubic meters per day of gas from six wells, which was below the capacity of the field's associated gas-processing plant of 3.5 million cubic meters per day. The production in the Moulvibazar gasfield was declining; hence, Chevron was exploring ways to increase or sustain the current production rate. The Bangura gasfield produced 2.8 million cubic meters per day of gas from four wells in 2015. Kris Energy planned to drill two additional development wells in 2016 in order to sustain the production rate (Bangladesh Oil, Gas and Mineral Corp., 2015, p. 32).

## Outlook

For Bangladesh to improve its economy and increase its per capita gross national income, the country will likely seek significant investments, especially for infrastructure development. In recent years, the Government has undertaken a number of mega projects, such as the construction of coal-based powerplants, the Dhaka-Chittagong access control highway, the Dhaka elevated expressway, the Karnafully tunnel, a metrorail system, the Padma bridge (which crosses the Padma River, connecting the western part of the country with the east), the Rooppur nuclear powerplant, and the Sonadia deep sea port. Many of the mentioned projects are expected to start construction in 2016 and beyond; however, in 2015, one of the main limitations to Bangladesh's economic development was the availability of reliable power sources. The country also faces such challenges to development as inadequate infrastructure, political unrest, and volatile commodity prices (Bangladesh Steel Re-Rolling Mills Ltd., 2015, p. 27, 43, 47, 49, 56; BSRM Steels Ltd., 2015, p. 37, 41).

In recent years, the demand for primary energy in Bangladesh has increased significantly, and Petrobangla continued its commitment to the discovery of new gasfields to increase the country's natural gas reserves by performing exploratory drillings and conducting seismic surveys. Current challenges faced by the country include implementing the steady import and storage of LNG (once projects commence in 2017) (Bangladesh Oil, Gas and Mineral Corp., 2015, p. 7, 17–18, 55).

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

(Metric tons unless otherwise specified)

Commodity <sup>2</sup>	2011	2012	2013	2014	2015
Cement, hydraulic thousand metric tons	14,690	15,250 <sup>r</sup>	16,780 <sup>r</sup>	17,000 <sup>r</sup>	18,000 <sup>c</sup>
Coal, bituminous <sup>3</sup>	861,072	854,805	854,804	947,125 <sup>r</sup>	675,776
Natural gas, marketed <sup>3,4</sup> million cubic meters	20,074 <sup>r</sup>	21,060 <sup>r</sup>	22,670 <sup>r</sup>	23,231 <sup>r</sup>	25,263
Petroleum:					
Crude thousand 42-gallon barrels	--	--	2,580	2,528	2,500 <sup>c</sup>
Refinery products:					
Bitumen do.	339	400	433	350	411
Diesel do.	2,821	2,798	2,879	2,697	2,896
Kerosene do.	2,186	1,748	2,211	1,787	1,896
Liquefied petroleum gas do.	154	148	161	130	128
Naphtha do.	1,097	931	1,144	1,082	1,332
Total do.	6,597	6,025	6,828	6,046	6,663
Salt, marine <sup>3</sup>	1,430,329	1,438,805	1,439,000	1,461,000	1,460,000 <sup>c</sup>
Steel:					
Billets	253,121	234,535	287,615	263,028	360,520
Other steel products	627,742	674,274	737,115	666,035	648,521
Stone:					
Boulder thousand cubic meters	5,575	5,580	5,335	5,432	5,500 <sup>c</sup>
Crushed, granite	360,071	281,402	332,773	187,342 <sup>r</sup>	931,476

<sup>c</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 December 30, 2016.

<sup>2</sup>In addition to the commodities listed, fertilizer and such construction materials as kaolin, limestone, nitrogen, sand and gravel, and other varieties of stone are known to have been produced, but available information was inadequate to make reliable estimates of output.

<sup>3</sup>Data are for the fiscal year ending June 30 of the year stated.

<sup>4</sup>Gross production is not reported; the quantity vented, flared, or reinjected is thought to be negligible.

TABLE 2  
BANGLADESH: STRUCTURE OF THE MINERAL INDUSTRY IN 2015

(Thousand metric tons unless otherwise specified)

Commodity	Major operating companies and major equity owners	Location of main facilities	Annual capacity
Cement	Chhatak Cement Factory Ltd. (Bangladesh Chemical Industries Corp.)	Shunamgnj, Chhatak	190.
Do.	Bangladesh Oil, Gas and Mineral Corp. (Petrobangla), 100%	Chittagong	1,000.
Do.	do.	Sylhet	1,100.
Do.	Cemex Cement Bangladesh Ltd.	Mahmudnagar	600.
Do. metric tons per day	Confidence Cement Ltd.	Chittagong	2,000.
Do.	HeidelbergCement Bangladesh Ltd.	Chittagong and Narayanganj (near Dhaka)	2,000.
Do.	Holcim (Bangladesh) Ltd.	2 plants in Meghnaghat (Narayanganj) and 1 plant in Mongla (Begerhat)	2,200.
Do.	Lafarge Surma Cement Ltd. (Lafarge Group and Cementos Molins S.A.)	Chhatak, Sunamganj	1,500 (1,150 clinker).
Do.	Meghna Cement Mills Ltd. (an enterprise of the Bashundhara Group of Bangladesh)	Mongla Port Industrial Zone and Pashur River Bank facility	1,000.
Do.	Premier Cement Mills Ltd.	West Mukterpur in Munshigonj	2,400.
Do.	Shah Cement Industries Ltd.	Dhaka	1,860.
Do.	Unique Cement Industries Ltd.	Chittagong, Dhaka, and Sylhet	1,440.
Do.	Various	18 additional facilities	5,240.

See footnotes at end of table.

TABLE 2—Continued  
BANGLADESH: STRUCTURE OF THE MINERAL INDUSTRY IN 2015

(Thousand metric tons unless otherwise specified)

Commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity
Coal		Barapukuria Coal Mining Co. Ltd. (BCMCL) [Bangladesh Oil, Gas and Mineral Corp. (Petrobangla), 100%]	Barapukuria, Rangpur Division	1,830.
Fertilizer		Di-Ammonium Phosphate Fertilizer Co. Ltd. (Bangladesh Chemical Industries Corp.)	Anowara, Chittagong	528.
Do.		Jamuna Fertilizer Co. Ltd. (Bangladesh Chemical Industries Corp.)	Tarakandi, Jamalpur	561.
Do.		Natural Gas Fertilizer Factory Ltd. (Bangladesh Chemical Industries Corp.)	Fenchugonj, Sylhet	106.
Do.		Polash Urea Fertilizer Ltd. (Bangladesh Chemical Industries Corp.)	Palash, Narsingdi	95.
Do.		Triple Super Phosphate Complex Ltd. (Bangladesh Chemical Industries Corp.)	North Potenga, Chittagong	100.
Do.		Urea Fertilizer Factory Ltd. (Bangladesh Chemical Industries Corp.)	Ghorashal, Narsindi	470.
Natural gas	million cubic meters per day	Bangladesh Gas Fields Co. Ltd. (BGFCL) [Bangladesh Oil, Gas and Mineral Corp. (Petrobangla), 100%]	Bakhrabad, Habiganj, Meghna, Narsingdi, and Titas gasfields	23.
Do.	do.	Bangladesh Petroleum Exploration and Production Co. Ltd. (BAPEX) [Bangladesh Oil, Gas and Mineral Corp. (Petrobangla), 100%]	Fenchuganj, Salda, Semutung, Shahbazpur, Srikail, and Sundalpur gasfields	4.
Do.	do.	Chevron Corp.	Bibiyana gasfield (Block 12)	40.
Do.	do.	do.	Jalalabad gasfield (Block 13)	8.
Do.	do.	do.	Moulvibazar gasfield (Block 14)	4.
Do.	do.	Niko Resources Ltd., 100%	Chattak and Feni gasfields <sup>1</sup>	6.
Do.	do.	Sylhet Gas Fields Ltd. (SGFL) [Bangladesh Oil, Gas and Mineral Corp. (Petrobangla), 100%]	Beanibazar, Kailashtila, Rashidpur and Sylhet gasfields	5.
Do.	do.	KrisEnergy Bangladesh Ltd., 30%; Niko Resources Ltd., 60%; and Bangladesh Petroleum Exploration and Production Co. Ltd. (BAPEX), 10%	Bangura gasfield (Block 9)	3.
Petroleum, refined	42-gallon barrels per day	Eastern Refinery Ltd. (Bangladesh Petroleum Corp.)	Chittagong	34,000.
<b>Steel:</b>				
Crude		Bangladesh Steel and Engineering Corp.	do.	20.
Do.		BSRM Iron and Steel Co. Ltd. (BISCO) [BSRM Steels Ltd. (BSL), 95%]	do.	190.
Do.		BSRM Ltd. Steel Melting Works (SMW)	do.	135.
Do.		BSRM Steel Mills Ltd. (BSML) [Bangladesh Steel Re-Rolling Mills Ltd. (BSRM Ltd.), 44.97%, and BSRM Steels Ltd. (BSL), 25.35%]	do.	862.
Products		Bangladesh Steel Re-Rolling Mills Ltd. (BSRM Ltd.)	Chittagong	450.
Do.		BSRM Steels Ltd. (BSL) [Bangladesh Steel Re-Rolling Mills Ltd. (BSRM Ltd.), 31.19%]	do.	700.
Do.		Nippon and McDonald Steel Industries Ltd. (Joint-venture between Nippon Steel and Sumitomo Metals Corp. and McDonald Steel Building Products Ltd.)	do.	NA.
Stone, boulder, and crushed, granite		Maddhapara Granite Mining Co. Ltd. [Bangladesh Oil, Gas and Mineral Corp. (Petrobangla)], 100%	Maddhapara, District of Dinajpur	1,650 (hard rock).

<sup>6</sup>Estimated; estimated data are rounded to no more than three significant digits. Do., do. Ditto. NA Not available.

<sup>1</sup>Inactive as of December 2015.