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2015 Minerals Yearbook

SYRIA [ADVANCE RELEASE]

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The Mineral Industry of Syria

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The mineral industry in Syria continued to be adversely affected by the ongoing armed conflict in the country for the fifth consecutive year. Large areas of the country were outside the reach and control of the Government. The Government, however, maintained control of most of the western half of the country in 2015, including the capital, Damascus; the two coastal Provinces of Latakia and Tartus; the cities of As Sweida, Dar'a, Hama, and Homs; and some areas in Aleppo and Dayr az Zawr Provinces. The opposition forces and the Kurdish Democratic Union Party controlled the northern part of Syria that borders Turkey, and the self-proclaimed Islamic State or Islamic State of Iraq and the Levant (ISIL) (also known as ISIS) was in control of the eastern part of Syria, including the cities of Ar Raqqah and Palmyra. Additionally, many areas were contested by various groups throughout the country (BBC, 2015).

The armed conflict between the Government and several rebel groups continued to cause widespread destruction to commercial, industrial, and residential structures in many parts of the country and forced more than one-half of the country's population of 22 million people to flee their homes to settle in safe areas within the country and in the neighboring countries of Iraq, Jordan, Lebanon, and Turkey (United Nations High Commission for Refugees, 2015).

Syria's mining activity was restricted to production of mineral fuels and industrial minerals; no metals (except for a small quantity of iron oxide for construction use) had been mined in recent years. In 2015, production of mineral commodities continued at reduced levels, especially cement, crude petroleum, natural gas, and phosphate rock output. The mineral commodities produced in Syria included cement, crude petroleum, gypsum, iron and steel, marble, natural crude asphalt, natural gas, phosphate rock, salt, refined petroleum products, sand and gravel, sulfur, and volcanic tuff (table 1).

Government Policies and Programs

The Government and some Syrian individuals remained subject to economic and financial sanctions by the United States and the European Union in 2015. The Syria Accountability Act of 2004 prohibited the export of most United States manufactured goods to Syria. The USA PATRIOT Act placed specific sanctions against the Commercial Bank of Syria in 2006, and sanctions were contained in several Executive orders from the President of the United States concerning Syria, which were issued between 2004 and 2012. These sanctions prohibited United States imports of petroleum and petroleum products from Syria and banned individuals from investing and operating in the country. Consequently, United States exports to Syria decreased to $3.1 million in 2015 from $503 million in 2010 and United States imports from Syria decreased to $6.5 million in 2015 from $429 million in 2010 (U.S. Office of Foreign Assets Control, 2014; U.S. Department of State, 2015; U.S. Census Bureau, 2016).

In December, the Council Implementing Regulation of the European Union removed Hmisho Group from its list of sanctioned entities. The group included Hmisho Steel S.A., which operated a rolling mill plant in Latakia and had the capacity to produce 500,000 metric tons per year (t/yr) of steel products (table 2; Lester, 2015).

Law No. 26 of 2009 grants the state ownership of all surface and subsurface mineral resources within the country's borders and territorial waters. Law No. 91 of January 24, 2010, gives the General Establishment of Geology and Mineral Resources (GEGMR) the responsibility for all mining and quarrying activities in the country. Except for phosphate rock production, which was carried out by the General Company for Phosphate and Mines (GECOPHAM), the GEGMR carries out virtually all mining activities in the country, either directly or through private contractors, including development, exploration, production activities, field and laboratory analyses, and geologic and geophysical studies. The GEGMR did not carry out any exploration studies in 2014 and 2015 because of the deterioration in the security situation in the country, especially in Aleppo, Al Hasakah, Ar Raqqah, Dar'a, and Dayr az Zawr Provinces, where all mining and quarrying activities were halted. The GEGMR employed 3,679 people in 2014 (General Establishment of Geology and Mineral Resources, 2015, p. 12, 13, 30).

The General Petroleum Corp. (GPC) of the Ministry of Petroleum and Mineral Resources (MOPMR), which was created by law No. 15 of 2009, was responsible for the country's hydrocarbon sector. The GPC's affiliates included Syrian Gas Co. (SGC), Syrian Petroleum Co. (SPC), and Syrian Company for Oil Transport (SCOT) (General Petroleum Corp., 2015; Ministry of Petroleum and Mineral Resources, 2016a).

Production

Natural asphalt mining at the Al Bishri Mine in Dayr az Zawr and Kafriyah in Latakia had been halted since 2014, and salt production at Dayr az Zawr and Al Hasakah also was stopped. Gypsum, marble, silica sand, and volcanic tuff production continued only intermittently in some locations and was stopped completely in other locations. Phosphate rock production continued at the Alsharqiya A and B Mines in 2014 but was stopped in the second half of 2015 (tables 1, 2; General Establishment of Geology and Mineral Resources, 2015, p. 26).

Structure of the Mineral Industry

In 2015, the Government was the only shareholder in the hydrocarbon sector through its ownership of SGC, SPC, and SCOT. The Government lost control of many oilfields in northeastern Syria to rebel groups, however, and those groups started producing small amounts of crude petroleum from some fields using primitive methods. All international oil companies that had been partners with SGC and SPC in crude petroleum and natural gas production had withdrawn from the country by 2012 because of the armed conflict and the sanctions by western countries that were imposed on SGC and SPC and their subsidiaries (table 2).

The Ministry of Industry is responsible for the cement and steel industries in the country through several state-owned enterprises that include the General Organization for Cement and Building Materials (GOCBM), the General Fertilizers Co., and the General Company for Iron and Steel Products. Since 2010, privately operated local companies have been quarrying for industrial minerals that are used as building materials, such as basalt, clays, dolomite, iron oxides, and limestone. Privately operated cement and iron and steel plants were established based on investment law No. 10 of 1991. The law and its amendment are intended to enhance the flow of foreign direct investment into the country and to allow for the private sector to take a bigger stake in the economic development of the country (table 2; Syrian Economic Forum, 2015, p. 9).

Commodity Review

Industrial Minerals

Cement.—Syria's consumption of cement continued to decrease owing to the armed conflict; it decreased to about 2.2 million metric tons (Mt) in 2015 from 10 Mt in 2010. The Al Badia cement plant, which is located at Abu ash Shamat in southeastern Syria and was owned and operated by Al Badia Cement J.S.C., has the capacity to produce 1.6 million metric tons per year (Mt/yr) of cement. Al Badia produced 509,000 metric tons (t) in 2015 compared with 484,000 t in 2014 and 550,000 t in 2013. The decrease in production in 2014 and 2015 compared with that in 2013 was attributed to weak demand because of the security situation in the country and risks related to the transport of cement. Production at the plant was stopped in November because of further deterioration of security in and around the area of the plant (table 2; Al Badia Cement J.S.C., 2016, p. 14, 26, 30).

In 2015, the GOCBM, which managed nine state-owned cement companies throughout the country, reported production in only three of its subsidiaries, which were located in relatively safe areas in Damascus, Hamah, and Tartus. The Syrian Company for Cement and Building Materials, which owned three plants in Hamah Province with a combined capacity of 2.86 Mt/yr, produced 700,000 t in 2015. Cement output at Tartus Cement and Building Materials Co., which had the capacity to produce 1.8 Mt/yr of cement, was 570,000 t; Adra Cement and Building Materials Co., which had the capacity to produce 1.5 Mt/yr of cement, produced 349,000 t. The GOCBM's combined cement output decreased to about 1.8 Mt in 2015 from 2.0 Mt in 2014, which was much less than the 5 Mt/yr of cement produced before the armed conflict. The decrease in production was attributed to the deterioration of security, which forced the closure of six of the company's nine plants (table 2; Aliqtisadi.com, 2016).

Lafarge Cement Syria, which was a subsidiary of Lafarge Group of France, shut down operations at its 3-Mt/yr-capacity cement plant at Jalabiya, which is located 160 kilometers northeast of Aleppo, and evacuated the workers because of the deterioration of the security situation in the region. The plant was guarded by the Government army until August 2013, then by the Syrian Kurdish Democratic Union Party before the plant was seized and set on fire by ISIL fighters in late September. In 2015, militants of ISIL blew up the plant after evacuating the plant equipment to the city of Ar Raqqah (the capital of the ISIL self-proclaimed state). The blast damaged about 80% of the plant (Ara News, 2015; International Cement Review, 2015, p. 336).

The Pharaon Investment Group Ltd. Holding S.A.L. planned to build a new 2-Mt/yr-capacity cement plant in Adra next to the existing cement plant, which was operated by Adra Cement. The ownership of the plant would follow the build-operate-transfer model by which Pharaon would build and operate the plant for 15 years and then transfer its equity in the plant to Adra Cement (Syrian Industries Guide, 2015).

Phosphate Rock.—In 2015, production of phosphate rock at the Alsharqiya and the Khunayfis Mines was halted following the ISIL's takeover of the city of Palmyra and most of Tadmur Province in eastern Syria. The Alsharqiya Mine had the capacity to produce 2.6 Mt/yr of phosphate rock, and the Khunayfis Mine, about 1 Mt/yr. Phosphate rock production was estimated to have decreased to 500,000 t in 2015 from 1.2 Mt in 2014. Before 2015, 80% of phosphate rock output was exported and the remainder was used by the domestic market. The main importer of phosphate rock from Syria was Selaata Chemicals Co. Sal (SCC) of Lebanon, which had previously imported 600,000 t/yr from Syria. In 2015, however, SCC imported only 265,000 t of phosphate rock, which was shipped by truck from Syria and apparently was not enough to meet the company's demand. SCC had to import an additional 337,000 t of phosphate rock by ship from Morocco to offset the shortage of phosphate rock supply from Syria. Other countries that imported phosphate rock from Syria included Austria, Greece, Italy, and Ukraine. Phosphate rock shipments to these countries historically went through the Port of Tartus on the Mediterranean Sea after being transferred by rail from the mines, which are located in eastern Syria. The Government planned to increase phosphate rock output to 6 Mt/yr in the short term and to 10 Mt/yr in the long term once the country's security situation improves and after the railroad line between the mines and the export terminal at the Port of Tartus are restarted and upgraded (Ministry of Petroleum and Mineral Resources, 2015, 2016b, c; Lebanese Customs Administration, 2016).

Mineral Fuels

Natural Gas and Petroleum.—According to the "BP Statistical Review of World Energy" of 2016, Syria's crude petroleum and condensate production decreased by 18% to 27,000 barrels per day (bbl/d) in 2015 from 33,000 bbl/d in 2014, which was about a 92% decrease from the 353,000 bbl/d produced in 2011. Natural gas output decreased by 8% in 2015 to 4.3 billion cubic meters from 4.7 billion cubic meters in 2014. The decrease in crude petroleum and natural gas production was attributed to military attacks on natural gas treatment plants and the Government losing control of most of the oilfields in northeastern Syria to ISIL and the Kurdish People's Defense Units militia of the Syrian Democratic Union Party.

The MOPMR reported that about 3.5 million barrels (Mbbl) (10,500 bbl/d) of crude petroleum was produced in Syria in 2015. Crude petroleum was delivered to the state-owned Banias and Homs refineries, which produced about 4.2 Mt (30 Mbbl) of refined products using both domestic and imported crude petroleum from Iran to meet domestic demand (BP p.l.c., 2016, p. 8, 22; Ministry of Petroleum and Mineral Resources, 2016c).

In 2015, almost all the oilfields in northeastern Syria were under the control of ISIL, including Al-Kharata, Al-Rashid, Al-Omar, Al-Shoula, Al-Tabaqa, Al-Thayyam, Al-Tanak, and Deiro. Production from these fields was estimated to be about 35,000 bbl/d in October. ISIL acted as a national oil company and tried to manage production, marketing, and refining operations in the areas of Syria (and Iraq) under its control. By yearend 2015, however, most of the oilfields, the machinery used for oil production, and the trucks used for transportation within the ISIL-controlled territories were severely damaged by United States-led coalition airstrikes in October and by Russian airstrikes later in the year (Solomon and others, 2016).

Outlook

Syria's gross domestic product was estimated to have contracted at a rate of 19% in 2015 and is projected to continue to contract at a rate of 8% in 2016. As the armed conflict continues to expand, more damage to the country's infrastructure and displacement of people is expected to take place. Production of phosphate rock is expected to be near zero in 2016, even though the Government regained control from ISIL of the phosphate rock mines in the Palmyra region in early 2016 (World Bank, The, 2016, p. 48).

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TABLE 1

SYRIA: ESTIMATED PRODUCTION OF MINERAL COMMODITIES[1]

(Thousand metric tons unless otherwise specified)

Commodity		2011	2012	2013	2014	2015
METALS						
Steel:						
Crude		70	10	10	5 r	5
Manufactured[2]		890	130	130	130	130
INDUSTRIAL MINERALS						
Asphalt, natural crude		81	13	10	10	--
Cement, hydraulic		5,000	6,000	4,000	3,800	4,000
Gypsum		559	328	300	181	150
Nitrogen:						
N content of ammonia		85	50	50	50	--
N content of urea		70	61	60 r	50	--
Phosphate:						
Phosphate rock, mine output:						
Gross weight		3,541	1,534	1,000	1,234	500
P_2O_5 content (30%)		1,100 r	460	300	370	150
P_2O_5 equivalent:						
Phosphatic fertilizers		170	85	70	70	--
Phosphoric acid		50	50	50	50	--
Salt		71	34	30	30	20
Sand and gravel		4,956	1,103	1,100	729	600
Stone:						
Dolomite, refractory grade[3]		35,700	21,200	20,000	4,880	4,000
Gravel and crushed rock[3]		817 r	300	300	202	200
Marble materials		173	80	80	93	90
Marble blocks	thousand square meters	124	123	100	92	90
Volcanic tuff		809	485	300	251	200
Sulfur:						
Byproduct of petroleum and natural gas		26	26	20	20	10
Sulfuric acid:						
Gross weight		83	40	40	20 r	20
S content		27	13	13	7 r	7
MINERAL FUELS AND RELATED MATERIALS						
Natural gas:						
Gross	million cubic meters	9,000	6,000	5,500 r	5,000	5,000
Dry	do.	7,100	5,800 r	5,100 r	4,700 r	4,300
Natural gas plant liquids	thousand 42-gallon barrels	3,650	1,900	330	330	330
Petroleum:						
Crude	do.	128,545	62,415	21,535	12,045	9,855
Refinery products[4]	do.	87,000 r	62,000 r	60,000 r	36,000 r	30,000

[r]Revised. do. Ditto. -- Zero.

[1]Table includes data available through March 23, 2017.

[2]Mostly from imported crude and semimanufactured steel.

[3]Converted to thousand metric tons from thousand cubic meters by multiplying by a factor of 2.85.

[4]Source: Organization of Arab Exporting Petroleum Countries, 2017, Databank: Organization of Arab Petroleum Exporting Countries. (Accessed March 14, 2019, at http://oapecdbsys.oapecorg.org:8080/apex/f?p=101:8:0).

TABLE 2
SYRIA: 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
Asphalt		General Establishment of Geology and Mineral Resources (GEGMR) (Government, 100%)	Mines at Al Bishri,[1] Dayr az Zawr, and Kafriyah,[1] Latakia	100
Cement		Adra Cement and Building Materials Co.[1]	Plant at Adra	1,500
Do.		Al Badia Cement J.S.C. (Al Muhaidib Holding Co., 29.5%; Syrinvest Holding B.V., 26%; public stockholders, 15%; Menaf S.A.S., 12%; Ziad Al Zaim, 7.5%; Al Fozan Holding Co., 5%)	Plant at Abu ash Shamat, Rif Dimashq Governorate	1,600
Do.		Al-Hasakeh Cement L.L.C. (Guris Holdings, 100%)	Clinker mill at Al-Hasakah[1]	700
Do.		Al-Shahaba Cement and Building Materials Co.[1]	Plant at Sheikh Said,[1] Aleppo	740
Do.		do.	Plant at Maslamieh,[1] Aleppo	220
Do.		Arabian Cement Co.[1]	do.	876
Do.		Guris Raqqa Cement Co. (Guris Holdings, 100%)	Clinker mill at Ar Raqqah[1]	1,500
Do.		Lafarge Cement Syria (Lafarge S.A., 98.67%, and Mas Economic Group S.A., 1.33%)	Plant at Jalabiya,[1] Aleppo	3,000
Do.		Military Housing Cement Group (Government, 100%)	Plant at Maslamieh	336
Do.		Rastan Cement and Building Materials Co.[2]	Plant at Rastan[1]	130
Do.		The Syrian Company for Cement and Building Materials[2]	Hamah cement plant I, Hamah	1,330
Do.		do.	Hamah cement plant II, Hamah	328
Do.		do.	Hamah cement plant III, Hamah	1,200
Do.		Tartus Cement and Building Materials Co.[1]	Plant at Tartus	1,825
Gypsum		General Establishment of Geology and Mineral Resources (GEGMR) (Government, 100%)	Mines at Ar Raqqah, Jayrud, and Latakia	573
Marble		do.	Mines Zobar, Latakia, and Sabboura	800
Natural gas	million cubic meters	Al Furat Petroleum Co. [General Petroleum Corp. (GPC), 100%]	Processing plant at Omar field[1]	2,400
Do.	do.	Ebla Petroleum Co. [General Petroleum Corp. (GPC), 100%]	Ash Shaer and Cherrife gasfields	2,500
Do.	do.	Syrian Gas Co. (Government, 100%)	Arak gasfield	13,770
Do.	do.	do.	Dubayat gasfield	14,872
Do.	do.	do.	Processing plant at Dayr az Zawr	4,750
Do.	do.	do.	Processing plant at Palmyra	2,200
Do.	do.	do.	Processing plant at Jebissa	1,060
Do.	do.	do.	Processing plant at Suwaydiyah	240
Do.	do.	do.	Abu Rabah, Al-Fayed north, Qumqum, Bilas, Al-Rasm, and Abu Al Dhuhr gasfields	1,825
Nitrogen:				
Ammonia[3]		General Fertilizers Co. (Government, 100%)	Plant at Homs[1]	300
Urea		do.	do.	330
Fertilizers		do.	do.	200
Petroleum:[4]				
Crude	thousand 42-gallon barrels	Al Bou Kamal Petroleum Co. [General Petroleum Corp. (GPC), 100%]	Al Kishima oilfield	NA
Do.	do.	Al-Furat Petroleum Co. [General Petroleum Corp. (GPC), 100%]	Al Izba, Al Ward, Galban, Jarnof-Saban, Maleh-Azraq, Al-Omar, Al-Omar North, Sijan, Al-Tanak, and Al-Thayyam fields	NA
Do.	do.	Deir Ezzor Petroleum Co. [General Petroleum Corp. (GPC), 100%]	Al-Mazraa, Attala North Jafra, Qahar, Tabiyeh fields	NA
Do.	do.	Dijla Petroleum Co. [General Petroleum Corp. (GPC), 100%]	Khurbet East field	NA
Do.	do.	Oudeh Petroleum Co. [General Petroleum Corp. (GPC), 100%]	Oudeh oilfield	NA
Do.	do.	Syria-Sino Al Kawkab Oil Co. [General Petroleum Corp. (GPC), 100%]	Gbeibe oilfield	NA
Do.	do.	Syrian Petroleum Co. (Government, 100%)	Jebissa, Karatchok, Rumailan, and Suwaydiyah fields	NA

See footnotes at end of table.

TABLE 2—Continued

SYRIA: 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
Petroleum:[4]—Continued				
Refined:	thousand 42-gallon barrels	Banias Refinery Co. (Government, 100%)	Refinery at Banias	48,545
Do.	do.	Homs Refinery Co. (Government, 100%)	Refinery at Homs	43,800
Phosphate rock		General Company for Phosphate and Mines (GECOPHAM) (Government, 100%)	Alsharqiya (A and B Mines)[1]	2,575
Do.		do.	Khunayfis Mine[1]	1,000
Phosphatic fertilizers		General Fertilizers Co. (Government, 100%)	Plant at Homs[1]	450
Phosphoric acid		do.	do.	100
Salt		General Establishment of Geology and Mineral Resources (GEGMR) (Government, 100%)	Jebseh and Palmyra brines[1]	120
Do.		do.	Tabni Mine,[1] Dayr az Zawr	100
Steel:				
Billet		General Company for Iron and Steel Products (Government, 100%)	Plant at Hamah	70
Rolled		Al Wahib Group	Plant at Tartus	100
Do.		Arabian Steel Co. (ASCO)	Plant at Jableh	300
Do.		General Company for Iron and Steel Products (Government, 100%)	Plant at Hamah	78
Do.		Hmisho Steel S.A.	Plant at Latakia	500
Do.		International Company for Steel Rolling	Plant at Hessya[1]	300
Do.		Joudco Steel Ltd.	do.	150
Do.		Middle East Steel Industries	Plant at Yabroud	140
Do.		Orient Co.	Plant at Aleppo[1]	NA
Do.		Syria Steel and Iron Co. (SALB)	Plant at Adra	NA
Sulfur		Homs Refinery Co.	Refinery at Homs	40
Do.		do.	Processing plant at Suwaydiyah	NA
Do.		Syrian Petroleum Co. (Government, 100%)	Processing plant at Jebissa	NA
Sulfuric acid		General Fertilizers Co. (Government, 100%)	Plant at Homs[1]	NA
Volcanic tuff		General Establishment of Geology and Mineral Resources (GEGMR) (Government, 100%)	Quarries at Daraa, Assowaida, Al Hasakah, and Ar Raqqah	1,000

Do., do. Ditto. NA Not available.

[1]Production was stopped in 2014.

[2]Subsidiary of the General Organization of Cement and Building Materials (GOCBM), which was 100% Government owned.

[3]Expressed in nitrogen equivalent.

[4]The majority of international companies withdrew from the country in 2012.