



2014 Minerals Yearbook

ETHIOPIA

THE MINERAL INDUSTRY OF ETHIOPIA

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In 2014, Ethiopia played a significant role in the world's production of tantalum; the country's share of global tantalum mine production was about 3%. Other domestically significant mining and mineral processing operations included cement, crushed stone, gemstones, and gold. Ethiopia was not a globally significant consumer of minerals in 2014 (Mining Journal, 2011; Addis Fortune, 2014; Papp, 2016).

Minerals in the National Economy

In 2014, the construction sector accounted for 9.4% of the nominal gross domestic product; manufacturing, 4.2%; and mining and quarrying, 1.0%. The value of output in the construction sector increased by 36.4% in 2014, and that of the manufacturing sector, by 11.3%. The value of output in the mining and quarrying sector decreased by 3.4% in 2014. About 1 million artisanal miners were employed in mining a variety of commodities, including gemstones, gold, niobium, and tantalum (The World Bank Group, 2014, p. 5; African Development Bank Group, 2015).

Ethiopia's total exports were \$3.25 billion in fiscal year 2014 (which ran from July 8, 2013 to July 7, 2014), of which gold accounted for \$456 million. Total imports were \$13.7 billion, of which petroleum products accounted for \$2.49 billion, and fertilizers, \$399 million (National Bank of Ethiopia, 2015, p. 75, 80).

The mining and quarrying sector was governed by Mining Income Tax Proclamation No. 53/1993, Mining Income Tax (Amendment) Proclamation No. 23/1996, Transaction of Precious Minerals Proclamation No. 651/2009, Mining Operations Proclamation No. 678/2010, and Mining Operations (Amendment) Proclamation No. 816/2013. Petroleum exploration and production were governed by Petroleum Operations Income Tax Proclamation No. 296/1986, Petroleum Operations Proclamation No. 295/1996, and Petroleum Operations Income Tax (Amendment) Proclamation No. 226/2000. The Ministry of Mines administered licenses for mining, quarrying, and petroleum. The Ministry of Environment and Forest was responsible for environmental regulation related to mining and quarrying.

Production

In fiscal year 2014, the production of lime increased by an estimated 609%; tantalum, by an estimated 206%; niobium (columbium), by an estimated 180%; coal, by an estimated 50%; most gemstones, by between 45% and 57%; soda ash, by an estimated 20%; cement, by an estimated 15%; and most construction materials, by between 30% and 39% (table 1).

Structure of the Mineral Industry

At the end of 2014, Ethiopia had 20 cement plants, of which 17 were known to be privately owned; Mughher Cement

Enterprise and Messebo Building Materials Production plc were state owned. Gold, marble, silica sand, and soda ash mining companies were privately owned. State-owned Ethiopian Mineral Development Share Co. (EMDSC) produced dolomite, feldspar, niobium, quartz, and tantalum in recent years. The mineral industry also included a number of small-scale and artisanal operations that produced gemstones, gold, niobium, and tantalum. Capacity, location, ownership, and production information was not readily available for many of these operations (table 2).

Commodity Review

Metals

Gold.—In the first 9 months of fiscal year 2014, artisanal miners produced 5,752 kilograms (kg) of gold compared with the Government's national target of 11,800 kg. Production in Southern Regional State was 66% of the Government's State target; Gambella Regional State, 53%; Tigray Regional State, 48%; Benishangul-Gumuz Regional State, 38%; and Oromia Regional State, 25% (Tadesse, 2014).

Midroc Gold Mine plc (a subsidiary of Midroc Group of Saudi Arabia) operated the Lega Dembi Mine. In the first 9 months of fiscal year 2014, exports by Midroc Gold Mine and other large-scale gold mines were 2,930 kg (Tadesse, 2014).

Kefi Minerals plc of the United Kingdom planned to build a new gold mine at the Tulu Kapi project in western Ethiopia. The company planned to produce between 2,800 and 3,100 kilograms per year of gold at Tulu Kapi during the estimated 12-year life of the mine. Kefi expected to receive a mining license by the first quarter of 2015. Depending on the Government's approval of Kefi's mining license application, production could start by December 2016 (Shemer, 2014).

Stratex International plc of the United Kingdom engaged in drilling at the Black Rock prospect in Afar in 2014; the company planned further drilling in 2015. In the fourth quarter of 2014, Stratex formed a joint-venture company with Thani Emirates Resources Holdings Ltd. of the United Arab Emirates. The new company, which was called Thani Stratex Resources Ltd., took over exploration at all Stratex properties in Ethiopia. Alecto Minerals plc and Centamin plc of the United Kingdom engaged in exploration at the Aysid-Metekel project in 2014; Centamin also explored at the Una Deriam project (Stratex International plc, 2015, p. 13).

Niobium (Columbium) and Tantalum.—In May 2012, EMDSC suspended production of columbite-tantalite at the Kenticha Mine because of Government plans to stop exporting unprocessed concentrates and to focus on building a new plant for downstream processing. The Government lifted the ban in 2013; EMDSC's exports partially recovered to 80 metric tons (t) of columbite-tantalite in fiscal year 2014 (Araya, 2013; Addis Fortune, 2014).

Cooperatives of artisanal miners produced columbite-tantalite in Oromia Regional State. The mining operations were shut down by the Government's ban on unprocessed columbite-tantalite exports in May 2012. After the ban was lifted, artisanal miners exported nearly 33 t of columbite-tantalite in fiscal year 2013. Exports in fiscal year 2014 increased to nearly 34 t; artisanal production remained well below the levels reached between fiscal years 2010 and 2012 (Addis Fortune, 2013, 2014; Araya, 2013).

Industrial Minerals

Cement.—Domestic cement production increased to an estimated 5.4 million metric tons (Mt) in fiscal year 2014 from 4.7 Mt in fiscal year 2013 and a revised 3.55 Mt in fiscal year 2012. Increased production was attributable to the opening of new plants and the expansion of existing plants. Ethiopia had 20 operating cement plants with a total capacity of about 12.6 million metric tons per year (Mt/yr) at the end of 2014 compared with 18 plants with a total capacity of 11 Mt/yr at the end of 2012 and 15 plants with a total capacity of 7.9 Mt/yr at the end of 2011 (International Cement Review, 2012; Edwards, 2013; National Cement Share Co., 2014; Kassa, 2015).

In 2014, Dangote Cement plc of Nigeria was engaged in the construction of a new plant at Mughher with a capacity of 2.5 Mt/yr. Ethio Cement plc was building a new plant at Chancho in Oromia State with a capacity of 850,000 metric tons per year (t/yr). The companies planned to complete their plants in the fourth quarter of 2014; the plants, however, were not completed by yearend. Habesha Cement Share Co. also planned to complete a new plant at Holeta in Oromia State with a capacity of 1.4 Mt/yr in 2016 (International Cement Review, 2015; Kassa, 2015).

Cement consumption increased to 6.28 Mt in fiscal year 2014 from 5.28 Mt in fiscal year 2013 and 4.44 Mt in fiscal year 2012 because of the rapid growth in the construction sector. The Government was engaged in the construction of the Grand Ethiopian Renaissance Dam, which was expected to have a capacity of 6,000 megawatts (MW) of hydropower, and a new 5,000-kilometer (km) railway. The Government also was expanding the road network (Kassa, 2015).

Gemstones.—Artisanal miners produced gemstones, including amethyst, aquamarine, emerald, garnet, opal, peridot, sapphire, and tourmaline. In the first 9 months of fiscal year 2014, gemstone exports were 28,038 kg, of which nearly 62 kg were cut and polished. Most exporters lacked gemstone cutting and polishing machinery. During the entire 2013 fiscal year, gemstone exports were 25,078 kg (Araya, 2013; Tadesse, 2014).

Lime.—In June 2013, Derba Lime and Chemicals (DLC) (a subsidiary of Midroc Group) started production at its new lime plant near Derba, which had a capacity of 73,000 t/yr. DLC and Senkele Lime Factory produced lime for external customers and Caustic Soda Share Co., and Wonji Shoa Sugar Factory produced lime mostly for its own consumption. The increase in national lime production in fiscal year 2014 was attributable to the opening of DLC's plant (Tiret Magazine, 2014b).

Nitrogen and Phosphate Rock.—Metal & Engineering Corp. (MetEC) was engaged in the construction of a new

fertilizer plant at Yayu Wereda in Oromia Regional State. The plant had a planned capacity of 300,000 t/yr of urea and 250,000 t/yr of diammonium phosphate fertilizer. Ammonia and urea would be produced from new domestic coal mines. MetEC planned to complete the plant by the end of fiscal year 2015. In March 2014, the plant was 20% completed when construction was halted because of a dispute between MetEC and a subcontractor (Tadesse, 2015).

Potash.—In April 2013, Allana Potash Corp. of Canada completed a feasibility study with favorable results on a new mine at the Dallol potash deposits. Allana planned to produce 1 Mt/yr of potash at Dallol, which is located in the Danakil Depression, in the first phase of mining. The company hoped to secure financing by mid-2015 and to start a 2-year construction phase. Allana planned to mine 400,000 t of potash in the first year of production, 750,000 t in the second year, and 1 Mt in the third year. Muriate of potash would be produced from the sylvinitic layer of the deposits; Allana planned to complete a preliminary economic assessment of mining higher value sulfate of potash from the kainite layer in early 2015. In February 2014, the company formed a strategic alliance with Israel Chemicals Ltd. to develop its potash deposits (Cornish, 2015).

Soda Ash.—Abijata-Shalla Soda Ash Share Co. [National Mining Corp. (NMiC), 62%, and Government, 38%] produced about 5,000 t/yr of soda ash from Lake Abijata for domestic consumption. In April 2014, the company signed an agreement with China National Complete Plant Import Export Corp. to conduct a feasibility study on a new processing plant, which would use brine from nearby Lake Shala. In previously announced plans, the plant could start production after 5 years with an initial capacity of 200,000 t/yr; capacity could expand subsequently to 1 Mt/yr. NMiC and the Government also planned to rehabilitate the existing plant to continue production until the new plant opened (Tiret Magazine, 2012, 2013, 2014a).

Mineral Fuels and Related Materials

Coal.—Delbi Coal Mining Share Co. operated a mine at Delbi that produced lignite; the company planned to produce 30,000 t in fiscal year 2014. In October 2013, Delbi Coal signed an agreement with May Flower Mining Enterprise Ltd. of India to increase the mine's output to 200,000 t/yr. May Flower planned to invest \$116 million over a 3-year period in return for a 70% interest in the mine. At the end of 2014, it was unclear whether the expansion had started (Ventures Africa, 2013).

MetEC planned to mine coal for consumption in the production of ammonia and urea at its fertilizer plant and in a new coal-fired power station with a capacity of 90 MW. In March 2014, the project was put on hold because of a dispute between MetEC and a subcontractor (Tadesse, 2015).

Petroleum.—As of yearend, Ethiopia was not a producer of crude or refined petroleum and relied on imported petroleum products. In July, Africa Oil Corp. of Canada and Tullow Oil plc of the United Kingdom announced that the Gardim-1 well at the South Omo Block was not prospective for petroleum. Africa Oil planned to drill at the Adigala and the Rift Basin Area Blocks in 2015 (Africa Oil Corp., 2014).

Outlook

Cement production is likely to increase from 2015 through 2018 to meet the increased demand of infrastructure and housing projects. The production of clay, gypsum, limestone, and pumice is expected to increase because of increased demand from cement plants; output of other construction materials is also likely to increase. The outlook for niobium and tantalum is an increase in production in 2015 because of the repeal of the ban on unprocessed columbite-tantalite exports. Lime output is expected to increase in 2015 and 2016 because of the opening of DLC's new plant. Gold and soda ash production are likely to increase starting in 2015 and 2019, respectively. Potash mining could start in 2017. Coal production is also planned to increase in the next few years.

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TABLE 1
ETHIOPIA: PRODUCTION OF MINERAL COMMODITIES^{1, 2}

(Metric tons unless otherwise specified)

Commodity ³		2010	2011 ^c	2012 ^c	2013 ^c	2014 ^c
METALS						
Columbite-tantalite, ore and concentrate:						
Gross weight	kilograms	252,433	285,000	380,000	50,000	114,000 ⁴
Nb content	do.	21,600	24,500	26,000	3,500	9,800
Ta content	do.	81,600	94,500	91,000	9,800	30,000
Gold, mine output, Au content	do.	6,773	10,891 ⁴	12,311 ⁴	12,581	11,600 ⁴
Platinum, mine output, Pt content	do.	8	-- ⁴	--	--	--
Silver, mine output, Ag content	do.	1,100 ^c	1,700	1,900	2,000	1,900
Steel:						
Crude		150,000 ^c	130,000	130,000	130,000	130,000
Semimanufactured ⁵		464,304	500,000	500,000	500,000	500,000

See footnotes at end of table.

TABLE 1—Continued
ETHIOPIA: PRODUCTION OF MINERAL COMMODITIES^{1,2}

(Metric tons unless otherwise specified)

Commodity ³	2010	2011 ^e	2012 ^e	2013 ^e	2014 ^e
INDUSTRIAL MINERALS					
Cement, hydraulic	1,638,613	2,082,366 ⁴	3,550,000 ^r	4,700,000 ^r	5,400,000
Clays:					
Brick clay	53,000 ^e	55,000	72,000 ^r	100,000 ^r	130,000
Kaolin, China clay	3,600	4,000 ⁴	4,500	4,800	4,600
Other clay	cubic meters	12,398	40,958 ⁴	46,000	49,000
Diatomite	4,000 ^e	4,000	4,500	4,800	4,600
Feldspar	1,500	441 ⁴	500	530	510
Gemstones:					
Amethyst	kilograms	7	-- ⁴	--	--
Aquamarine	do.	105	667 ⁴	700	1,100
Citrine	do.	1	3 ⁴	3	8
Emerald	do.	10	15	15	23
Garnet	do.	24	29 ⁴	30	45
Morganite	do.	4	1 ⁴	1	2
Opal	do.	12,821	13,839 ⁴	14,000	21,000
Peridot	do.	--	7 ⁴	10	15
Quartz	do.	2,853	1,492 ⁴	1,500	2,300
Ruby	do.	26	56 ⁴	55	85
Sapphire	do.	1	45 ⁴	45	70
Tourmaline	do.	2	103 ⁴	110	170
Gypsum and anhydrite, crude	41,000	46,000	52,000	55,000 ^r	53,000
Lime	3,254	2,481 ^{r,4}	2,500	5,500	39,000
Quartz	280	363 ⁴	410	440	430
Salt, rock	330,359	388,153 ⁴	440,000	470,000	450,000
Soda ash, natural	4,000	4,500	5,000	5,000	6,000
Stone, sand and gravel: ⁶					
Basalt:					
Construction stone	1,400,000	1,600,000	2,100,000 ^r	2,900,000 ^r	4,000,000
Other	85,000 ^e	96,000	130,000 ^r	180,000 ^r	250,000
Dolomite	2,900 ^e	3,190 ⁴	4,200 ^r	5,800 ^r	7,900
Granite	square meters	5,700 ^e	6,400	8,400 ^r	11,000 ^r
Ignimbrite	cubic meters	430,000 ^e	490,000	640,000 ^r	890,000 ^r
Limestone:					
Slab and tiles	square meters	3,300 ^e	3,700	4,900 ^r	6,800 ^r
Other	thousand metric tons	2,300 ^e	2,600	3,400 ^r	4,700 ^r
Marble:					
Slab and tiles	square meters	152,421	143,820 ⁴	190,000 ^r	260,000 ^r
Terrazzo	do.	170,000 ^e	190,000	250,000 ^r	350,000 ^r
Block and other		250,000	280,000	370,000 ^r	510,000 ^r
Pumice		128,106	254,152 ⁴	330,000 ^r	460,000 ^r
Rhyolite		32,000 ^e	36,000	47,000 ^r	65,000 ^r
Sand	thousand metric tons	950 ^e	1,100	1,400 ^r	1,900 ^r
Sandstone	do.	2,000 ^e	2,300	3,000 ^r	4,200 ^r
Scoria		200,000 ^e	230,000	300,000 ^r	420,000 ^r
Silica sand		70,250	7,000	7,000	33,000
MINERAL FUELS AND RELATED MATERIALS					
Coal, lignite	20,000 ^r	20,000	20,000	20,000	30,000

^eEstimated; estimated data are rounded to no more than three significant digits. ^rRevised. do. Ditto. -- Zero.

¹Table includes data available through February 9, 2016.

²Data are for the Ethiopian fiscal year ending July 7 of the year listed, except for steel, which are for the calendar year ending December 31 of the year listed.

³In addition to the commodities listed, glass, sulfuric acid, and talc reportedly were produced, but information was inadequate to make reliable estimates of output.

⁴Reported figure.

⁵Galvanized steel sheets only.

⁶When reported as volume or pieces, conversions to metric tons are estimated.

TABLE 2
ETHIOPIA: STRUCTURE OF THE MINERAL INDUSTRY IN 2014

(Metric tons unless otherwise specified)

Commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity
Caustic soda		Caustic Soda Share Co.	Plant at Ziway	10,000.
Cement		Derba Midroc Cement plc	Plant at Derba	2,500,000.
Do.		do.	do.	90,000.
Do.		do.	Plant at Dejen	90,000.
Do.		Mugher Cement Enterprise (Government, 100%)	Plant at Mugher	2,276,000.
Do.		Messebo Building Materials Production plc (Government, 100%)	Plant at Mekele	2,240,000.
Do.		National Cement Share Co.	Plants at Dire Dawa	1,350,000.
Do.		East Cement Share Co.	Plant at Dukem	750,000.
Do.		Ture Dire Dawa Cement Factory Share Co.	Plant at Dire Dawa	500,000.
Do.		Capital Clinker and Packaging plc	NA	450,000.
Do.		Pioneer Cement plc	NA	450,000.
Do.		Huang Shan Cement plc	Plant near Modijo	435,000.
Do.		Encheni Medrock Cement plc	NA	300,000.
Do.		Jiangsu Zhongshun Import and Export Trade Company Ltd.	Plant at Dukem	250,000.
Do.		Hua Yu Cement	NA	150,000.
Do.		Red Fox International Investment plc	Plant at Adama	100,000.
Do.		Abyssinia Cement plc	Plant at Chancho	90,000.
Do.		Derbasina Business Industries plc	Plant at Holeta	90,000.
Do.		Jema Cement plc	Plant in North Shoa zone	45,000.
Clay				
Kaolin		Ethiopian Mineral Development Share Co. (EMDSC)	Mine at Bamba Wuha	7,500.
Other		Pioneer Cement plc	Mine near Melka Jebdu	67,000. ^c
Coal, lignite		Delbi Coal Mining Share Co.	Mine at Delbi	30,000. ^c
Dolomite		Ethiopian Mineral Development Share Co. (Government, 100%)	Kenticha Mine near Borena	8,000. ¹
Feldspar		do.	do.	8,000. ¹
Gemstones, opal		Artisanal miners	Mine at Wegel Tena	NA.
Do.		do.	Mine near Gashena	NA.
Glass		Ethiopia Hansom International Glass plc [CGC Overseas Construction Ltd. (CGCOC) and China-Africa Development Fund]	Plant at Addis Ababa	42,000.
Do.		Addis Ababa Bottle and Glass Share Co.	do.	8,000.
Gold	kilograms	Midroc Gold Mine plc (subsidiary of Midroc Group)	Mine at Lega Dembi	3,400. ^c
Do.	do.	Artisanal miners	Mines in Oromia Regional State	3,300. ^c
Do.	do.	do.	Mines in Tigray Regional State	2,300. ^c
Do.	do.	do.	Mines in Benishangul-Gumuz Regional State	1,200. ^c
Do.	do.	do.	Mines in Gambella Regional State	1,100. ^c
Do.	do.	do.	Mines in Southern Nations Nationalities, and Peoples' Regional State	800. ^c
Do.	do.	do.	Mines in Amhara Regional State	300. ^c
Gypsum		Pioneer Cement plc	Mine near Dewelle	30,000. ^c
Lime		Derba Lime and Chemicals (DLC) (Midroc Group, 100%)	Plant near Derba	73,000.
Do.		Senkele Lime Factory	Plant at Ambo	6,000. ^c
Do.		Caustic Soda Share Co. (Government, 100%)	Plant at Ziway	NA.
Do.		Wonji Shoa Sugar Factory	Plant near Wonji	NA.
Niobium (columbium) and tantalum, ore and concentrate		Ethiopian Mineral Development Share Co.	Kenticha Mine near Borena	90 tantalum; 20 niobium.
Do.		Artisanal miners	Mines in Oromia Regional State	25 tantalum; 14 niobium.
Platinum	kilograms	Nyota Minerals Ltd.	Mine at Yubdo ²	10. ^c
Quartz		Ethiopian Mineral Development Share Co.	Kenticha Mine near Borena	8,000. ¹
Salt		Artisanal miners	Mines at Afdera Lake	NA.

See footnotes at end of table.

TABLE 2—Continued
ETHIOPIA: STRUCTURE OF THE MINERAL INDUSTRY IN 2014

(Metric tons unless otherwise specified)

Commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity
Silica sand		CGC Overseas Construction Ltd. (CGCOC)	Mine near Lemi	180,000. ^c
Silver	kilograms	Midroc Gold Mine plc (subsidiary of Midroc Group)	Mine at Lega Dembi	1,100. ^c
Soda ash		Abijata-Shalla Soda Ash Share Co. [National Mining Corp. plc (NMiC), 62%; Government, 38%]	Mine at Lake Abijata	20,000.
Steel:				
Crude		Abyssinia Integrated Steel plc	Plant at Debre Zeit	150,000. ^c
Do.		Sheba Steel Mills plc	do.	20,000. ^c
Semimanufactured		Abyssinia Integrated Steel plc	do.	150,000.
Do.		Zuquala Steel Rolling Mill Enterprise (Government, 100%)	do.	36,000.
Do.		Wallia Steel Factory	Plant at Alemgena	36,000.
Do.		Sheba Steel Mills plc	Plant at Debre Zeit	20,000.
Stone, crushed		CGC Overseas Construction Ltd. (CGCOC)	Plant at Addis Ababa	930,000. ^c
Stone, dimension	cubic meters	Ethiopian Marble Processing Enterprise (Government, 100%)	Mines at Eckonti, Harar, and Mankush	5,000. ^c
Do.	square meters	do.	Plants at Addis Ababa, Bole, and Nifas Silk	65,000.
Do.	cubic meters	National Mining Corp. plc (subsidiary of Midroc Ethiopia Group)	Mines at Beninshangul and Harar	4,500.
Do.	square meters	do.	Plant at Awash	60,000.
Do.	cubic meters	Saba Stones	Mines in Tigray Region	4,500 marble; 2,200 limestone; 1,500 granite.
Sulfuric acid		Melkasa Aluminum Sulfate and Sulfuric Acid Factory	Plant at Melkasa	14,600.

^cEstimated. Do., do. Ditto. NA Not available.

¹The combined capacity for the dolomite, feldspar, and quartz processing plant at the Kenticha Mine is 8,000 metric tons per year.

²Not operating at the end of 2014.