



2019 Minerals Yearbook

CAMBODIA [ADVANCE RELEASE]

THE MINERAL INDUSTRY OF CAMBODIA

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In 2019, Cambodia produced cement, salt, sand and gravel (construction), silica, and stone, which together represented a minor part of the country's economy. Additional commodities, such as clay, gemstones, gold, iron ore, and limestone, may have been produced, but reliable information on output was not available (table 1; Kimsay, 2019b).

In 2019, the real gross domestic product (GDP) increased by 7.0% compared with an increase of 7.5% in 2018. The nominal GDP in 2019 increased to \$26.7 billion from \$24.4 billion in 2018. According to the Ministry of Mines and Energy (MME), the revenue from the mining sector, which contributed 2.5% of the total national revenue in 2019, was expected to increase to 5% in 2020 and to 10% in 2023 owing to anticipated increases in gold and crude petroleum production in the near future (International Monetary Fund, 2019; Kimsay, 2019b; Asian Development Bank, 2020, p. 265).

The National Bank of Cambodia (NBC) reported that the value of total exports in 2019 was \$14.5 billion (KHR58.9 trillion)¹ and the value of total imports was \$20.5 billion (KHR83.2 trillion). Imports of petroleum were valued at \$1.75 billion (KHR7.09 trillion), followed by steel (\$473 million or KHR1.92 trillion), fertilizer (\$213 million or KHR867 billion), cement (\$129 million or KHR523 billion), and gold (\$91 million or KHR371 billion) (National Bank of Cambodia, 2019a, p. 31; 2019b, p. 31; 2020a, p. 30; 2020b, p. 30).

In 2019, the value of Cambodia's exports to the United States increased by 40% to \$5.36 billion from \$3.82 billion in 2018. Exports of diamond (\$22.9 million), iron and steel products (\$2.6 million), and stone, sand, and cement (\$1.3 million) accounted for 0.5% of total exports to the United States. The value of imports from the United States increased by 15% to \$513 million from \$446 million in 2018. Imports of alumina and aluminum, coal, copper, gem diamond, iron and steel products, nonferrous metals, nonmetallic minerals, petroleum products, precious metals (not including gold), and steelmaking materials were valued at \$2.61 million, which accounted for 0.5% of the total imports from the United States (U.S. Census Bureau, 2020a, b).

All mineral resources, whether in solid, liquid, or gaseous form, within the territory of Cambodia are owned by the Government. Mineral resource licenses are required for mineral prospecting, exploration, and extraction. Any owner or lawful occupant of private land may use gravel, sand, rock, and clay without a mineral resource license but is not allowed to transport these materials out of the owned land boundaries (SK&P Cambodia Law Group, 2001, p. 1, 2).

The legislative framework for the mineral sector in Cambodia is provided by the Law on Mineral Resource Management and Exploitation of 2001. According to the law, the Government is

responsible for exploration, production, and trade of mineral resources and products. In May 2016, the Government enacted Sub-Decree No. 72 (On Administration of Mineral Exploration and Industrial Mining Licenses) to promote socially responsible and environmentally friendly mineral exploration and mining operations. In May 2018, the National Policy on Mineral Resources 2018–2028 was introduced to define the vision, objectives, goals, and roles of the Government in developing the valuable mineral resources, such as bauxite, copper, gemstones, gold, and iron and establishing key strategies and sustainable and transparent action plans. The National Policy on Mineral Resources does not cover oil and gas (SK&P Cambodia Law Group, 2001, p. 1; Open Development Cambodia, 2016a; Saktheara, 2016; Ministry of Mines and Energy, 2018, p. 1, 2, 16).

Until 2019, the oil and gas industry was governed by the Petroleum Regulation, which was enacted in 1991. In July 2019, the Law on Management of Oil and Petroleum Products (Petroleum Law) was enacted and replaced the Petroleum Regulation. The Petroleum Law gives authority to the MME to manage the exploration for and development and production of petroleum. The implementing regulations for the Petroleum Law were expected to be announced when commercial production is available (Open Development Cambodia, 2016b; Tomkiewicz and others, 2019).

Production

In 2019, production of salt increased by 200%; gravel, by 62%; cement, and sand and gravel (unspecified), by 61% each; crushed stone, by 60%; and silica, by 3%. Data on mineral production are in table 1.

Structure of the Mineral Industry

Companies from Australia, China, India, Japan, the Republic of Korea, and Vietnam, some of which partnered with local companies, were exploring for minerals. By yearend 2017 (the latest year for which data were available), 54 exploration licenses had been granted by the Government to conduct surveys for such metallic minerals as bauxite, copper, gold, and iron. In addition, the Government granted 27 mining licenses for coal, gold, iron, and silica, and 260 licenses for gravel, laterite, sand, and crushed stone for infrastructure development. Table 2 is a list of major mineral industry facilities. Employment in the mining and quarrying sector was estimated to be 6,500 people, which accounted for less than 0.1% of the 8.8 million employed in 2017 (Open Development Cambodia, 2016a; Ministry of Mines and Energy, 2018, p. 1, 2; National Institute of Statistics, 2018, p. 56).

¹Where necessary, values have been converted from Cambodian riel (KHR) to U.S. dollars (US\$) at an annual average exchange rate of KHR4,061=US\$1.00 for 2019 and KHR4,066=US\$1.00 for 2018.

Commodity Review

Metals

Copper.—In April 2019, Nittetsu Mining (Cambodia) Ltd., which was a subsidiary of Japan Oil, Gas and Metals National Corp. (JOGMEC), was granted a 3-year copper exploration license for a 133-square kilometer (km²) area in Anlong Chrey, Thala Barivat District, Stung Treng Province. The company was conducting an environmental impact assessment and was expected to start exploration in early 2020 (Vireak, 2019).

Gold.—Mesco Gold (Cambodia) Co. Ltd. (Mesco), which was a subsidiary of Mesco Steel Ltd. of India, obtained the first mining license after obtaining an approval of environmental and social impact assessment at the Phum Syarung gold project from the MME in 2016. Grab samples from underground incline shafts 1 and 2 at the Phum Syarung Mine had grades of between 4.3 and 40.2 grams per metric ton (g/t) gold, 10.3 and 47.5 g/t silver, and 0.15% and 0.44% copper. Since 2016, Mesco had been working on the construction of the processing plant, which would produce from 350 to 550 kilograms per year (kg/yr) of gold at full capacity. Construction of the plant was approximately 20% complete by the end of 2019 (Angkor Gold Corp., 2018b, p. 1; Kimsay, 2019a; Bunthoeun, 2020).

In December 2018, Angkor Gold Corp. announced the sampling and mapping results at its Banlung property, which includes the Okalla East and Okalla West deposits. The grab samples had grades up to 13.95 g/t gold and 62.9 g/t silver. Angkor Gold Corp. changed its name to Angkor Resources Corp. (Ankor) in 2019. The corporation's expanded diamond-drilling program of 966 meters in 10 holes demonstrated gold grades of between 1.26 and 5.72 g/t (Angkor Gold Corp., 2018a, p. 1; Angkor Resources Corp., 2019, p. 1; 2020, p. 18).

Renaissance Minerals (Cambodia) Ltd., which was a subsidiary of Emerald Resources NL of Australia, was granted a mining license at the Okvau gold project in Mondul Seima District from the MME in July 2018. Renaissance Minerals commenced construction at the project in January 2019 and received a Mineral Investment Agreement from the Cambodian Council of Ministers in November 2019. Ore reserves at the Okvau project were 14.3 million metric tons (Mt) grading 2.0 g/t gold, which was equivalent to 28,000 kilograms of gold. The capacity of the processing plant was 2.0 million metric tons per year (Mt/yr) of ore, which was equivalent to 3,300 kg/yr of gold (Emerald Resources NL, 2020, p. 3, 8, 9).

Industrial Minerals

Cement.—In 2019, Cambodia produced 7.87 Mt of cement; production was by Kampot Cement Co. Ltd. (2.49 Mt), Battambang Conch Cement Co. Ltd. (2.07 Mt), Chip Mong Insee Cement Corp. (1.87 Mt), and Cambodia Cement Chakrey Ting Factory Co. (1.44 Mt). In November 2019, Thai Boon Roong Cement Co. Ltd. of Thailand inaugurated a cement plant in La'ang, Dang Tong District, Kampot Province. The plant had a cement-production capacity of 0.9 Mt/yr and was the fifth cement plant built in Cambodia. In 2019, Cambodia's cement production capacity increased to 10.7 Mt/yr from 9.4 Mt/yr in 2018, which was higher than the projected domestic demand of

9.0 Mt/yr for 2020 (tables 1, 2; Cemnet News, 2018; Sokhorn, 2018b; Global Cement, 2019; Cambodia Constructors Association, 2020).

Salt.—The production of salt came mostly from the coasts of Kampot and Kep Provinces and was accomplished by pumping and evaporating seawater from the Gulf of Thailand. During a typical dry season from January to April, salt farmers could harvest up to 100,000 metric tons (t) of salt by mid-March. After the production of 140,000 t of salt in 2016 owing to significantly better weather (that is, a long dry season), heavy rain in the next two dry seasons decreased annual production to 32,000 t in 2017 and an estimated 10,000 t in 2018. In 2019, Cambodia again produced only about 30,000 t of salt owing to continued rain in the harvest season, and the country imported 50,000 t of salt from China to meet domestic demand (table 1; Sokhorn, 2018a; Keeton-Olsen, 2019; Pisei, 2019).

Mineral Fuels

Petroleum.—Cambodia established six offshore blocks (A through F), 19 onshore blocks (I through XIX), and 4 blocks in an overlapping claims area that was being contested with Thailand. In 2020, KrisEnergy Ltd. of Singapore, which had been developing the Apsara oilfield in Block A in the Khmer basin, anticipated a first stage yield of about 8,000 barrels per day and a yield of 8.5 million barrels (Mbbbl) from the field's estimated 30 Mbbbl of petroleum reserves. In July 2019, the company completed a three-dimensional seismic survey of a-1,200 km² area. In August 2019, EnerCam Resources Singapore Pty. Ltd. (a subsidiary of Angkor) received license approval from the Government for the Block VIII oil and gas concession in the Kampong-Som basin over an area of 7,300 km² (Open Development Cambodia, 2016b; Kimsay, 2018; KrisEnergy Ltd., 2019, p. 9; Turton, 2019; Angkor Resources Corp., 2020, p. 8, 18).

Outlook

In the short term, construction of processing plants at the Phum Syarung gold project and the Okvau gold project are expected to be completed, which will make it possible to begin commercial extraction and refining of gold. The country is also expected to start crude petroleum production in the near future. These anticipated developments will significantly increase the output of the mineral industry in the next few years.

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TABLE 1
CAMBODIA: PRODUCTION OF MINERAL COMMODITIES¹

(Thousand metric tons, gross weight)

Commodity ²	2015	2016	2017	2018	2019
INDUSTRIAL MINERALS					
Cement, hydraulic	1,700 ^e	2,100 ^e	3,400	4,900 ^e	7,870
Salt, sea salt	170 ^e	140 ^e	32	10 ^e	30 ^e
Sand and gravel, industrial, silica ^{e,3}	540	840 ^r	1,030 ^r	1,020 ^r	1,050
Stone, sand and gravel, construction:					
Sand and gravel:					
Gravel ^e	50	55	89	130	210
Unspecified	9,000	10,000	16,000	23,000	37,000 ^e
Stone, crushed, unspecified ^e	6,000	6,500	11,000	15,000	24,000

^eEstimated. ^rRevised

¹Table includes data available through July 6, 2020. All data are reported unless otherwise noted. Estimated data are rounded to no more than three significant digits.

²In addition to the commodities listed, clay, gemstones, gold, iron ore, and limestone may have been produced, but available information was inadequate to make reliable estimates of output.

³Estimate based on trade data. Source: United Nations Comtrade database.

TABLE 2
CAMBODIA: STRUCTURE OF THE MINERAL INDUSTRY IN 2019

(Thousand metric tons)

Commodity	Main operating companies and main equity owners	Location of main facilities	Annual capacity ^e
Cement	Battambang Conch Cement Co. Ltd. [Conch International Holdings (HK) Ltd., 60%, and Battambang KT Cement Co. Ltd., 40%]	Plant in Rattanak District, Battambang Province	2,100
Do.	Cambodia Cement Chakrey Ting Factory Co. Ltd. (Huaxin Cement. Co. Ltd., 68%, and others, 32%)	Chakrey Ting plant in Phnom Tatung, Touk Meas District, Kampot Province	1,500
Do.	Chip Mong Insee Cement Corp. (Chip Mong Group, 60%, and Siam City Cement Public Co. Ltd., 40%)	Touk Meas Plant in Toul Meas, Banteay Meas District, Kampot Province	2,000
Do.	Kampot Cement Co. Ltd. (Siam Cement Public Co. Ltd., 94%, and Khaou Chuly Group, 6%)	First plant in Dangtong District, Kampot Province	1,100
Do.	do.	Second plant in Dangtong District, Kampot Province	900
Do.	do.	Battambang plant in Ratanak Mondol District, Battambang Province	1,800
Do.	Thai Boon Roong Cement Co. Ltd.	Plant in La'ang, Dang Tong District, Kampot Province	1,300
Gold	Cambodia WS Mining Industry Holding Ltd.	Mine in Tropeang Tontem, Rovieng District, Preah Vihear Province	NA
Do.	Delcom Cambodia Pte. Ltd. (Deleum Service Holdings Ltd., 100%)	do.	NA
Do.	Phou Yang (Cambodia) Co. Ltd.	Mine in Phnom Prek District, Battambang Province	NA
Do.	Xing Yuan Kang Yeak Co.	Mine in Kbal Darmrey Commune, Sambor District, Kratie Province	NA
Limestone	Kampot Cement Co. Ltd. (Siam Cement Public Co. Ltd., 94%, and Khaou Chuly Group, 6%)	Touk Meas District, Kampot Province	1,500
Do.	Thai Boon Roong Cement Co. Ltd.	Phnom Laang Laan Commune, Donghtung District, Kampot Province	NA
Salt	Confirel Co. Ltd.	Small salt farmers in Kampot and Kep Provinces	100
Sand:			
Construction	LYP Group Co.	NA	1,920
Do.	Udom Seima Peanikch Industry and Mine Co.	NA	950
Industrial	Mong Reththy Group Co. Ltd.	NA	NA
Do.	Sibelco Cambodia Co. Ltd.	NA	NA

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