

2009 Minerals Yearbook

BANGLADESH

BANGLADESH-2009

THE MINERAL INDUSTRY OF BANGLADESH

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In 2009, the mineral industry of Bangladesh produced mainly coal, granite, natural gas, and petroleum. The country lacks reserves of metallic minerals but has a large potential for the occurrence of natural gas. In 2008 (the most recent year for which data were available), mining accounted for 1% of the country's gross domestic product (GDP) and the construction sector accounted for 8%. The Bangladesh Oil, Gas and Mineral Corp. (Petrobangla) is the Government entity that is responsible for the exploration for, production of, and distribution of natural gas in Bangladesh. In 2008, Petrobangla performed exploratory drillings and conducted three-dimensional seismic surveys in an attempt to discover new gasfields to increase the country's natural gas reserves. Petrobangla was also in charge of the development of economically feasible mineral deposits in the country whereas exploring for minerals was the responsibility of the Geological Survey of Bangladesh (Bangladesh Oil, Gas and Mineral Corp., 2008, p. 8, 17; Asian Development Bank, 2009, p. 1).

Bangladesh and neighboring countries Burma (to the east) and India (to the west) were involved in a maritime boundary dispute concerning their respective sovereignty in the Bay of Bengal. In October 2009, Bangladesh claimed its maritime boundary before the United Nations courts, under the arbitration of the United Nations Convention on the Law of the Sea (UNCLOS) of 1982. The dispute amongst the three countries was preventing Bangladesh from exploring further for resources offshore. At the end of 2008, the situation intensified when Daewoo International Corp. of the Republic of Korea started oil and gas exploration in the disputed maritime zone between Bangladesh and Burma. Daewoo was exploring offshore Burma as part of a gas sale and purchase agreement with the Government of Burma, under which Daewoo was the main operator in three exploration blocks (Choudhury, 2009).

According to the UNCLOS, a nation can claim 12 nautical miles of territorial sea, 200 nautical miles of exclusive economic zone, and 200 nautical miles of continental shelf (United Nations, 1982). In the case of Bangladesh, Burma, and India, their coastlines curve, which results in overlap of their respective maritime territories and makes it difficult to delimit their maritime boundaries. Since 1974, Burma and India had aggressively explored their coasts, which resulted in the discovery of significant petroleum resources, including Burma's discovery of 7 trillion cubic feet (198 billion cubic meters) of gas and India's discovery of 100 trillion cubic feet (2.8 trillion cubic meters) of gas in 2005-06. Bangladesh's gas reserves are estimated to be 14 to 15 trillion cubic feet (396 to 425 billion cubic meters) (Choudhury, 2009; Chron.com, 2009).

In 1974, the Bangladesh Parliament passed the Territorial and Maritime Zones Act of 1974, which asserted Bangladesh's jurisdiction over the territorial waters, exclusive economic zone, and continental shelf as outlined in the Act. Since 1974, the Government of Bangladesh had held negotiation meetings with the Governments of Burma and India, including talks with India in 1982 and Burma in 1986, but the issue remained unresolved. In 2008, Bangladesh conducted a series of talks to settle the boundary dispute with both countries, but little progress was achieved, and the meetings ended inconclusively. In October 2009, Bangladesh submitted a notification requesting arbitration under the UNCLOS. Bangladesh was due to file a formal objection claim or a resolution claim before the United Nations by July 27, 2011, to contest Burma and India's line of demarcation, which was based on the principal of equidistant boundary and which Burma and India had agreed to in 1986. Bangladesh demanded that demarcation of the boundary be based on the equity principle, which results in overlapping maritime areas (Choudhury, 2009).

In recent years, Bangladesh has produced 1,750 million cubic feet per day (49.6 million cubic meters per day) of natural gas, which was 200 million cubic feet (5.7 million cubic meters) short of the daily domestic consumption demand (Choudhury, 2009).

Production

Bangladesh produced small amounts of industrial minerals and processed products, which included cement, clay, limestone, nitrogen fertilizer, and salt. Eastern Refinery Ltd., which was a subsidiary of Bangladesh Petroleum Corp. (BPC), was Bangladesh's sole petroleum refining company. The refinery, which was located in Chittagong, produced petroleum products from imported crude oil. Output from the refinery met about 40% of the country's demand for petroleum products (Eastern Refinery Ltd., 2010).

Structure of the Mineral Industry

In addition to exploring for, producing, and distributing oil and gas, Petrobangla also explored for and produced coal and granite through its subsidiaries Barapukuria Coal Mining Company Ltd., and Maddhapara Granite Mining Corp. Ltd., respectively. Table 2 is a list of major mineral industry facilities.

Commodity Review

Industrial Minerals

Cement.—Bangladesh had approximately 30 operational cement companies that had a combined annual production capacity of about 15 to 20 million metric tons (Mt) of cement; the country's domestic demand for cement was 8.5 million metric tons per year (Mt/yr). This situation prompted increased competition within the domestic cement market, which, in turn, resulted in many local producers consolidating their businesses and (or) enhancing their production capacity. In 2008 (the most recent year for which data were available), local producers accounted for an average of 60% of the country's total cement production and foreign manufacturers accounted for the

remaining 40% (Financial Express, The, 2009b; Khan, 2009; LankaBangla Securities, 2009).

Domestic demand for cement was projected to increase as a result of Government plans to build large-scale infrastructure projects in the country. The Government projected that one such project—construction of the Padma Multipurpose Bridge—would begin in 2010-11 and would be completed by 2015. The bridge, which would span the Padma River, would connect the southwest region with the rest of the country. At about 6 kilometers in length, it would be the longest bridge in the country and would complement the Bangabanddhu Jamuna Multipurpose Bridge, which links the western part of Bangladesh with the east (EnergyBangla.com, 2009; Khan, 2009).

Lafarge Surma Cement Ltd., which was a joint venture of Cementos Molins S.A. of Spain and Lafarge Group of France, operated a plant located at Chhatak in the district of Sunamganj in northeastern Bangladesh. Lafarge Surma mined the raw material that fed the plant from its affiliate quarry at East Khasi Hills in Meghalaya State, India. Materials from the quarry were transported 17 kilometers (km) across the border from India to Bangladesh by conveyor belt. The Lafarge Surma Cement plant was the only integrated (clinker and cement) producer in Bangladesh (Lafarge Surma Cement Ltd., 2009; 2010, p. F75).

Lafarge Surma commenced commercial production at the Chhatak plant in October 2006 with an annual production capacity of 1.5 million metric tons (Mt) of cement and 1.15 Mt of clinker; this level of cement production represented about 10% of the domestic cement production. In 2008, the Lafarge Surma cement plant operated below full capacity after a disruption in the supply of limestone in 2007 halted operations at the plant. The supply disruption was owing to a court injunction concerning a dispute in the land use classification of the quarry facility in India. The Indian Government claimed the quarry as forestland as opposed to the quarry's official classification as wasteland; this resulted in charges to the quarry operators for environmental degradation. A hearing before the Supreme Court of India was scheduled for the first quarter of 2010 to discuss the application procedure for a permanent extraction permit to operate the quarry (LankaBangla Securities, 2009; Lafarge Surma Cement Ltd., 2010, p. F75).

HeidelbergCement Bangladesh Ltd., which was a subsidiary of HeidelbergCement Group of Germany, operated two plants in Bangladesh. The plants were located in the Patenga area of Chittagong and in the Kanchpur area of Narayangonj. In February 2008, the company completed the installation of a second cement grinding unit with an annual capacity of 450,000 metric tons (t) at its Kanchpur plant, which increased HeidelbergCement Bangladesh's total annual production capacity to 2 Mt of cement. The company is expected to finalize an expansion project for a third grinding unit at the Chittagong plant by the summer of 2011; the new unit would increase the plant's annual production capacity by another 800,000 t of cement (LankaBangla Securities, 2008; HeidelbergCement Group, 2009, p. 61; HeidelbergCement Bangladesh Ltd., 2010a, p. 1; 2010b).

Stone, Crushed.—Maddhapara Granite was the Petrobangla subsidiary responsible for the production of granite at

Petrobangla's underground mine in the District of Dinajpur. The facility had a capacity to produce about 1.65 million metric tons per year (Mt/yr) of hard rock. The Maddhapara Mine commenced partial commercial production in May 2007. Between July 1, 2008, and May 1, 2009, the mine produced 583,857 t of stone, of which 323,748 t, or more than 50%, was sold domestically for use as construction material, such as aggregates (Bangladesh Oil, Gas and Mineral Corp., 2008, p. 29; Maddhapara Granite Mining Co. Ltd., 2010).

Mineral Fuels

Coal.—The Barapukuria coal mine, which was managed by Barapukuria Coal Mining Co. Ltd. (BCMCL) (a subsidiary of Petrobangla), was the first and only operating coal mine in Bangladesh. The mine reported total production of 109,098 t of coal in fiscal year 2008-09 (which ran from July 1, 2008, through June 30, 2009); this amount was about 84% less than the amount produced in the previous fiscal year. Production peaks in 2006 and 2007 were mainly owing to stockpile production from previous years. Coal produced from the mine was being used for power generation in the 250-megawatt-capacity coal-fired thermal powerplant located near the mine in the District of Dinajpur (Bangladesh Oil, Gas and Mineral Corp., 2008, p. 28-29; Barapukuria Coal Mining Co. Ltd., 2009).

In 2009, the London-based company Global Coal Management Resources (GCM) was still awaiting approval from the Government to develop the Phulbari coal project, which is located in the northwest region of Phulbari. GCM had held a 30-year term mining lease and exploration license in the Phulbari area since 2004. In October 2005, GCM submitted a feasibility study and a development scheme to the Government for evaluation and approval. Since that time, political instability in Bangladesh and an ongoing Government review of the country's coal policy had delayed the evaluation process. Once approved, the coal policy would guide the development of the coal industry and help establish coal as the primary fuel for power generation, thereby ensuring a reliable source of energy for the country (Global Coal Management Resources, 2009, p. 17, 25).

To satisfy the country's demand, Bangladesh imported coal mined from Meghalaya, India. On June 30, Bangladesh banned the import of this coal, citing sulfur content of greater than 1%, which causes air pollution, although the coal is favored for its low ash content. On July 15, the Ministry of Commerce lifted the ban and decided to extend the importation of coal from India for a period of 1 year. Other coal deposits have been found in Bangladesh, primarily in the northern areas of the country, but owing to the lack of a state coal policy, the coal could not be extracted. The imported coal was used mainly in kilns for brick fabrication (Financial Express, The, 2009a; Quadir, 2009b).

Natural Gas.—Petrobangla started to carry out extensive exploration and drilling activities to increase gas reserves, given that natural gas was used to produce approximately 73% of the commercial energy in Bangladesh (based on 2008 estimates, which was the most recent year for which data were available). The Government forecast that currently known natural gas reserves would be depleted by 2015 at current demand; in 2009,

demand exceeded supply, which resulted in frequent energy shortages. As of yearend 2008, a total of 23 gasfields had been discovered in the country, and by June 2009, the estimated proven recoverable reserves were about 204 billion cubic meters (reported as 7.208 trillion cubic feet) (Bangladesh Oil, Gas and Mineral Corp., 2008, p. 8; Quadir, 2009a).

In fiscal year 2008-09, five companies under Petrobangla carried out gas transmission and distribution in Bangladesh. One of these companies, Titas Gas Transmission and Distribution Co. Ltd. (TGTDCL), constructed 606 km of new distribution pipeline, which increased the length of the country's total pipeline network to 11,496 km. TGTDCL provided gas to 11 power stations of the Bangladesh Power Development Board, 20 private power stations, and 4 fertilizer factories (Titas Gas Transmission and Distribution Co. Ltd., 2009).

In July 2009, Cairn Energy plc of the United Kingdom announced that an onshore compressor was installed and commissioned in the Sangu Plant in Chittagong to increase and extend field production at the Sangu gasfield, which was Bangladesh's only offshore gasfield. The gasfield, which is located in the Bay of Bengal, produced 4.8 million cubic meters per day (reported as 170 million cubic feet per day) in 2005, but by December 2008, production had decreased to 1.4 million cubic meters per day (reported as 50 million cubic feet per day). The new compressor was expected to increase gas recovery by 5 billion cubic feet (142 million cubic meters) for the remainder of the gasfield's life (Bangladesh Oil, Gas and Mineral Corp., 2008, p. 9; Cairn Energy plc, 2009, p. 27).

In August, the Bangladesh Government awarded three offshore blocks in the Bay of Bengal to two international companies, which would then be awarded production-sharing contracts for hydrocarbon exploration with a provision to export the gas as liquefied natural gas. Two blocks were awarded to ConocoPhillips Co. of the United States, and one block was awarded to Tullow Oil plc of Ireland. Petrobangla's chairman, however, advised that exploration in disputed waters would not be allowed, pending resolution of the maritime boundary dispute with Burma and India. The companies were to invest a combined \$160.5 million for exploration during the next 5 years (Chron.com, 2009; Quadir, 2009a).

Tullow Oil also had operations in Bangladesh's offshore Bangora-Lalmai gasfield, in which the company held a 30% interest. In October, the Bangora-3 well was added into the gasfield system, which increased the gas production capacity to 120 million cubic feet per day from 100 million cubic feet per day (3.4 million cubic meters per day from 2.8 million cubic meters per day) (Tullow Oil plc, 2009, p. 52).

In September, Chevron Corp. discovered gas in its Bibiyana gasfield, which is located at Sylhet in northeastern Bangladesh. After the discovery, the gasfield was estimated to contain a total of 6.6 trillion cubic feet (187 billion cubic meters) of gas, which was an increase from the previously estimated 3.4 trillion cubic feet (96 billion cubic meters) of gas (Rigzone.com, 2009).

Outlook

In the next few years, cement, coal, and crushed stone demand is expected to increase because of Government plans to build bridges and implement other improvements to the country's infrastructure. Cement production capacity could increase as local producers continue to enhance their facility's annual capacity.

The Government is expected to continue to establish joint ventures with international companies, particularly for exploration in the mineral fuels sector, especially if Bangladesh, Burma, and India agree in a resolution to solve their maritime boundary dispute. Once the final review of the coal policy is completed and the new policy is in place, the Government of Bangladesh would likely be able to move toward the goal of having the entire country with a dependable power supply by 2020 (Bangladesh Oil, Gas and Mineral Corp., 2008, p. 8, 35).

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TABLE 1

BANGLADESH: ESTIMATED PRODUCTION OF MINERAL COMMODITIES^{1, 2}

(Metric tons unless otherwise specified)

| Commodity ³ | 2005 | 2006 | 2007 | 2008 | 2009 |
|---|---------------------|---------------------|--------------|-------------------------|-----------|
| Cement, hydraulic ⁴ | 5,100,000 | 5,100,000 | 5,100,000 | 5,000,000 | 5,000,000 |
| Clays, kaolin ⁴ | 8,400 | 8,500 | 8,600 | 8,500 | 8,500 |
| Coal, bituminous ⁴ | 303,016 5 | 388,000 | 677,000 | 109,098 ^{r, 5} | 200,000 |
| Gas, natural, marketed ^{4, 6} million cubic meters | 14,915 ⁵ | 15,918 ⁵ | 17,014 5 | 18,516 ⁵ | 19,000 |
| Iron and steel, metal: ⁴ | | | | | |
| Steel, crude, ingot only | 20,000 | 10,000 | | | |
| Steel products | 70,000 | 70,000 | 60,000 | 60,000 | 60,000 |
| Nitrogen, N content of urea, ammonia, | 1,380,000 | 1,250,000 | 1,300,000 | 1,300,000 | 1,300,000 |
| ammonium sulfate | | | | | |
| Petroleum: | | | | | |
| Crude thousand 42-gallon barrels | 1,663 5 | 1,715 5 | 1,800 | 1,800 | 1,800 |
| Refinery products do. | 9,200 | 9,300 | 9,400 | 9,500 | 9,500 |
| Salt, marine ⁴ | 350,000 | 350,000 | 360,000 | 360,000 | 360,000 |
| Stone, crushed: | | | | | |
| Granite | 900,000 | 1,200,000 | 258,516 r, 5 | 583,857 ^{r, 5} | 600,000 |
| Limestone | 35,179 5 | 67,736 ⁵ | 70,000 | 70,000 | 70,000 |

^rRevised. do. Ditto. -- Zero.

¹Estimated data are rounded to no more than three significant digits.

²Table includes data available through September 7, 2010.

³In addition to the commodities listed, crude construction materials, such as sand and gravel and other varieties of stone, presumably are

produced, but available information is inadequate to make reliable estimates of output.

⁴Data are for fiscal year ending June 30 of following year.

⁵Reported figure.

⁶Gross production is not reported; the quantity vented, flared, or reinjected is believed to be negligible.

TABLE 2 BANGLADESH: STRUCTURE OF THE MINERAL INDUSTRY IN 2009

(Thousand metric tons unless otherwise specified)

| | | | | Annual |
|-------------------------|---------------------------------|--|--|------------------------|
| Commo | odity | Major operating companies and major equity owners | Location of main facilities | capacity ^e |
| Cement | | Bangladesh Oil, Gas and Mineral Corp. (Petrobangla) | Chittagong | 1,000. |
| Do. | | do. | Sylhet | 1,100. |
| Do. | | Cemex Cement Bangladesh Ltd. | Mahmudnagar | 600. |
| Do. | | HeidelbergCement Bangladesh Ltd. | Chittagong and Narayangonj | 2,000. |
| Do. | | Holcim (Bangladesh) Ltd. | Bagerhat and Narayanganj | 1,300. |
| Do. | | Lafarge Surma Cement Ltd. (Lafarge Group and Cementos Molins S.A.) | Chhatak, Sunamganj | 1,500 (1,150 clinker). |
| Do. | | Premier Cement Mills Ltd. | Muktarpul and Munshiganj | 1,460. |
| Do. | | Shah Cement Industries Ltd. | Dhaka | 1,860. |
| Do. | | Unique Cement Industries Ltd. | Chittagong, Dhaka, and Sylhet | 1,440. |
| Coal | | Barapukuria Coal Mining Co. Ltd. (BCMCL) [Bangladesh Oil, Gas and Mineral Corp. (Petrobangla), 100%] | Barapukuria | 1,000. |
| Fertilizer | | Bangladesh Chemical Fertilizer Corp. | Auganish | 560. |
| Do. | | do. | Fenchugani | 100. |
| Do. | | do. | Ghorasai | 600. |
| Gas, natural | million cubic meters per day | Bangladesh Gas Fields Co. Ltd. (BGFCL) [Bangladesh Oil, Gas. and Mineral Corp. (Petrobangla), 100%] | Bakhrabad, Habigangj, Kamta, Meghna, Narsingdi, and Titas | 22. |
| Do. | do. | Bangladesh Petroleum Exploration and Production Co. Ltd. (BAPEX) [Bangladesh Oil, Gas and Mineral Corp. (Petrobangla), 100%] | Fenchuganj and Saldanadi | 2. |
| Do. | do. | Cairn Energy plc | Sangu (offshore) | 3. |
| Do. | do. | Chevron Corp. | Bibiyana, Jalalabad, and Maulavi Bazar | 17. |
| Do. | do. | Niko Resources Ltd. | Bibiyana and Feni | 6. |
| Do. | do. | Sylhet Gas Fields Ltd. (SGFL) [Bangladesh Oil, Gas and Mineral Corp. (Petrobangla), 100%] | Beanibazar, Haripur, Kailashtila, and Rashidpur | 5. |
| Do. | do. | Tullow Oil plc | Bangora | 2. |
| Petroleum: | | - | - | |
| Crude | 42-gallon barrels | Cairn Energy plc | Sangu | 30,000. |
| Refined | do | Eastern Refinery Ltd. | Chittagong | 34,000 |
| Steel, crude | u 0. | Bangladesh Steel and Engineering Corp. | do. | 20. |
| Stone, crushed, granite | | Maddhapara Granite Mining Co. Ltd. [Bangladesh Oil, Gas and Mineral Corp. (Petrobangla)] | Maddhapara, District of Dinajpur | 1,650. |

^eEstimated; estimated data are rounded to no more than three significant digits. Do., do. Ditto.