



WELCOME TO OUR

# *Weekly Newsletter*

**In this newsletter :**

In this newsletter, we cover key investment trends shaping 2026, evolving policy and resource sovereignty dynamics, the latest critical minerals and commodity outlook, major industry challenges, and a spotlight on a standout company navigating these shifts.

## **The State of African Mining in 2026**

2026 is not just another year for African mining. It is a defining moment. From Cape Town to Kinshasa, from Accra to Lusaka, the continent is no longer positioned as just a supplier of raw materials — it is becoming a strategic anchor in the global energy transition, digital economy, and industrial future.

Investment is returning. Policy frameworks are tightening. Critical minerals are commanding geopolitical attention.

Africa is not reacting anymore. It is negotiating.

This month, we take a big-picture look at where the sector stands — investment flows, policy shifts, commodity performance, and what it all means moving forward.

# Headline Story: Africa's Mining Landscape in 2026

AFRICAN MINING IN 2026 IS DEFINED BY THREE DOMINANT FORCES:

## 1. Investment Repositioning

Global capital is flowing back into Africa — particularly into copper, lithium, cobalt, graphite, rare earths, and gold. Strategic partnerships between African states and Western, Middle Eastern, and Asian investors are reshaping supply chain alignment. The focus has shifted from pure extraction to long-term mineral security. Africa holds over 30% of global critical mineral reserves. That leverage is no longer theoretical — it is influencing trade negotiations.

## 2. Policy & Sovereignty

Across West and Southern Africa, governments are reforming mining codes to balance:

- Investor certainty
- Local ownership
- Value retention
- Transparent licensing

Digital cadastre systems are being implemented to improve efficiency and reduce corruption risk.

Regional blocs are calling for harmonised policy frameworks to reduce regulatory fragmentation.

The message is clear: African governments want partnership — not dependency.



### 3. Commodities: Traditional Meets Strategic

Gold remains resilient amid global economic uncertainty.  
Copper demand is rising alongside electrification targets.  
Lithium and rare earths are accelerating as battery supply chains expand.

Iron ore and bauxite remain foundational to infrastructure and manufacturing growth.  
The difference in 2026?  
These commodities are no longer viewed in isolation. They are part of geopolitical strategy.

#### Challenges Ahead

Despite progress, constraints remain:

- Infrastructure bottlenecks
- Energy instability in some regions
- Exploration funding gaps
- Illegal mining pressures
- ESG compliance costs

If Africa can align infrastructure reform with mineral strategy, the upside is significant.

Subscribe to stay ahead of Africa's mining transformation in 2026.



## Focus Drives Mining Growth

Success in Africa's mining industry comes to those who concentrate on strategy, sustainability, and critical minerals, turning challenges into opportunities.



## Coming Up

MINING INDABA FOLLOW-UP ROUNDTABLE –  
**MARCH 2026**

Post-Indaba insights and next steps.



## Company Spotlight

THE SIMANDOU IRON ORE PROJECT IN GUINEA

This month we spotlight large-scale infrastructure-linked mining developments reshaping long-term strategy.

The Simandou iron ore project in Guinea remains one of the most capital-intensive mining developments globally, with over \$20 billion committed across rail, port, and extraction infrastructure.

Simandou is not just a mine — it is a demonstration of how mineral wealth can anchor national infrastructure transformation.

Meanwhile, copper expansion targets in the Democratic Republic of the Congo and Zambia continue to align with rising global electrification demand, reinforcing Africa's leverage in the global energy transition

[See full case study on website](#)



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## An Industry First

### MAKING WAVES WITH STRATEGIC MINERAL INSIGHT

Following discussions at the Investing in African Mining Indaba 2026, collaboration between Governments and private sector leaders remain central to unlocking capital at scale. We've compiled updated insight briefs on:

- Critical Minerals Strategy alignment
- Public-Private Partnership structures
- Regional policy harmonisation across SADC

African mining stakeholders are increasingly focused on:

- ESG compliance frameworks
- Digital licensing systems
- Junior miner funding strategies
- Cross-border mineral corridors
- Value-addition and beneficiation models

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