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EDITOR'S NOTE

The impression of diplomatic progress and the military reality on the ground diverged sharply this week across three primary theaters in Africa. In Sudan, while diplomatic briefings highlighted principle agreements on ceasefires and the lifting of emergency states, ground forces expanded operations across Kordofan and Blue Nile, accompanied by escalating risks of mass atrocities. Similarly, in the eastern Democratic Republic of the Congo, formal monitoring mechanisms coincided with renewed offensives and severe civilian casualties. In Mali, touted diplomatic gains contrasted with documented military raids on civilians and sustained financial flows to insurgent groups. Across all three cases, diplomatic milestones remained largely procedural, while armed factions maintained independent operational and financial momentum.

Simultaneously, the interplay between resource nationalization and the pursuit of foreign capital has created a complex economic landscape. States across the Sahel and Central Africa are increasingly asserting control over critical mineral assets and restricting raw exports. Yet, structural deficits—particularly in domestic power infrastructure—and pressing financial needs continue to compel these same governments into intricate partnerships with international investors. Rather than contradicting one another, state sovereignty initiatives and foreign investment drives are actively reinforcing new structural models across the continent's energy and mining sectors.

This dynamic is further heightened as external powers recalibrate their strategic positioning. Regional actors and global powers are moving beyond single-issue engagements, simultaneously deploying diplomatic, security, and commercial instruments to consolidate influence. Consequently, Africa's crisis zones can no longer be evaluated in isolation. Resource supply chains, defense partnerships, and geopolitical competition are intersecting across shared strategic corridors, shaping an environment where commercial expansion continues even as security risks remain unpriced.

Levent Kemal

Executive Director, MINTEL WORLD

WEEKLY OVERVIEW

The impression of diplomatic progress and the military reality on the ground diverged sharply this week across three different theaters. In Sudan, a briefing presented to the UN Security Council on 24–25 August stated that 13 million people had been displaced. Khartoum lifted the state of emergency during the same week, while Burhan said he had agreed in principle to a 90-day ceasefire. The risk of mass atrocities around El Obeid increased, while the RSF launched its largest security mobilization in Nyala. The front expanded into Kordofan and Blue Nile. A similar pattern emerged in eastern DRC. While the monitoring mechanism of the Washington Agreement continued through meetings and official communications, the AFC/M23 launched new attacks in Kalehe, Fizi and Masisi. The DRC government stated that the coalition had carried out mass executions of more than 300 people between June and July.

In Mali, Bamako presented the release of 82 soldiers and the pardon of French national Yann Vézilier as diplomatic gains. Human Rights Watch, however, documented that Russian paramilitaries linked to the Africa Corps killed nine civilians in the village of Bombori during the same week. A UN report revealed that JNIM had financed its latest wave of attacks with a \$50 million ransom. In all three cases, diplomatic gains were based on process indicators such as prisoner releases and ceasefire statements. The RSF, AFC/M23 and JNIM continued their own logistical and financial cycles independently of these processes. The debate over the arms embargo on Sudan made this particularly clear. Denmark, the UK and France called for the arms embargo to be expanded to cover drones, while China and Russia opposed the move. This division is effectively paralyzing the Security Council.

The nationalization of resources and the effort to attract foreign capital may appear contradictory, but in practice they are reinforcing each other. Niger transferred Orano's Somaïr operating license to the state-owned company Tsumco and increased the state's stake in Madaouela to 40%. It did so without waiting for the ongoing international arbitration cases involving Orano and GoviEx to conclude. The DRC continued to restrict exports of raw copper and cobalt. However, its electricity deficit prevents it from building the refining capacity needed to make these restrictions operational. Libya moved in the opposite direction. After 17 years, it awarded a block to Chevron in its first licensing round. The NOC openly stated that it was seeking \$40 billion in external financing to reach its production target.

Sovereignty-driven policies are expanding state control, while the need for capital is forcing the same states into new and more complex partnerships with foreign investors. Zijin Gold's investment in the Kurmuk gold project in Ethiopia, ADNOC's investment in Shell's downstream business in South Africa, and OCP's investment in a phosphate facility in Louisiana, United States, are concrete examples of this model.

Mining and energy investments are increasingly moving forward without fully pricing in security risks. Zijin's \$300 million investment in Kurmuk is taking place near the Blue Nile border area, where the Sudanese army claimed to have shot down a drone launched from Ethiopian territory during the same week. Trinity Metals' \$50 million tungsten expansion in Rwanda, together with its potential New York listing, is progressing amid criticism linking mineral trade to the M23/AFC conflict along Rwanda's border with the DRC. In Mali, gold production increased by 30% to

23.5 tonnes. During the same week, three young workers died from toxic gas at a gold site in Gao. Large-scale formal mining and unregulated artisanal extraction are expanding simultaneously within the same economic environment.

The positioning of external powers also shifted this week. Algeria invited the prime ministers of Mali and Niger to its territory during the same week, donated four helicopters to Niger, and launched three separate energy initiatives through Sonatrach. Within the AES bloc, Algeria moved to fill the space left by France across both the security and energy fronts. Türkiye increased its diplomatic visibility through Foreign Minister Hakan Fidan's meeting with Haftar in Benghazi and the commemoration of the 15th anniversary of Türkiye–Somalia relations. Unverified claims of an airstrike by Puntland, however, opened a new potential line of friction. Russia maintained its security influence in the Sahel through the Goïta–Putin meeting and the continued presence of the Africa Corps. In Sudan, it also maintained its influence at the UN by joining China in blocking efforts to expand the arms embargo. Algeria, Türkiye and Russia sought to fill the same strategic space during the same week, using different instruments.

The debate over the Sudan arms embargo is reinforcing polarization within the Security Council. The conflict along the DRC–Rwanda border directly affects critical mineral supply chains, while JNIM's pressure in the Sahel is creating further space for Algeria to expand its regional influence. Africa's crisis zones can no longer be understood as isolated cases. Resource chains, security partnerships and diplomatic competition are increasingly intersecting in the same theaters within the same week.



CONFLICT AND WAR

SUDAN.

In a briefing presented to the UN Security Council on 24–25 August, UN political affairs chief Rosemary DiCarlo stated that 13 million people had been forced to leave their homes since the beginning of the war, including 8.7 million internally displaced people. The UN documented approximately 1,400 civilian deaths between January and June, including 1,100 deaths caused by drone attacks. Fighting intensified in North Kordofan, Darfur and Blue Nile, while DiCarlo warned of a growing risk of mass atrocities around El Obeid.

In South Kordofan, the SPLM-North launched a major offensive against rival Otoro forces near Kauda at 5 a.m. on 21 August. According to local sources, heavy artillery fire caused fires in the settlements of Shiri, Kadri and Korbla, while shells hit residential areas and displacement camps. The offensive marked a sharp escalation in fighting that had intensified in May over a tribal border dispute.

In a statement issued on 23 August, the RSF claimed that it had destroyed 331 combat and armored vehicles, seven fuel and supply trucks, and four rocket launchers and artillery pieces during two weeks of fighting in Darfur and Kordofan. It also claimed to have captured two tanks and three electronic jamming vehicles. During the same

week, the Darfur Joint Force, an alliance of Darfuri armed groups supporting the Sudanese army, said it had attacked an RSF convoy in the northern desert near the Libyan border. The group claimed to have destroyed 49 vehicles, captured 30 vehicles and a fuel tanker, and detained 70 RSF members. The stated objective was to disrupt arms and fuel smuggling routes operating through Libya. On 24 August, suspected Sudanese army drones struck RSF positions in Nyala, hours after a large cargo aircraft landed in the city. Explosions intensified around the al-Riyadh district, the airport area and the Nyala University campus.



The cross-border cost of the war became visible in two separate incidents this week. Chad claimed that forces affiliated with the Sudanese army had carried out air and drone strikes against a vehicle convoy on 20 August in Ennedi-Est province, approximately 100 kilometers inside Chadian territory. The Chadian General Staff said the aircraft had followed the convoy from the Sudanese side of the border, while the African Union said it was alarmed by the incident. On another front, the Sudanese army said it had shot down a drone near Kurmuk/Dandro in Blue Nile State on 23–24 August, claiming that it had been launched from Ethiopian territory. On 27 August, the army reported that it had shot down a second hostile drone north of Sarkam.

Violence also escalated in South Sudan. The UN reported that two MINUSS peacekeepers were killed in an ambush in Jonglei State. In the Bentiu displacement camp in Unity State, an attempt to arrest Taban Puol, who claims to be the reincarnation of the 19th-century Nuer prophet Ngundeng Bong, turned violent. At least nine people were killed and 23 injured.



Fighting intensified in North Kordofan, Darfur, and Blue Nile, while a warning was issued regarding the growing risk of mass atrocities around El Obeid.



RSF Advances in Blue Nile State

August 2026

 RSF Base
 Pro-RSF Rebels

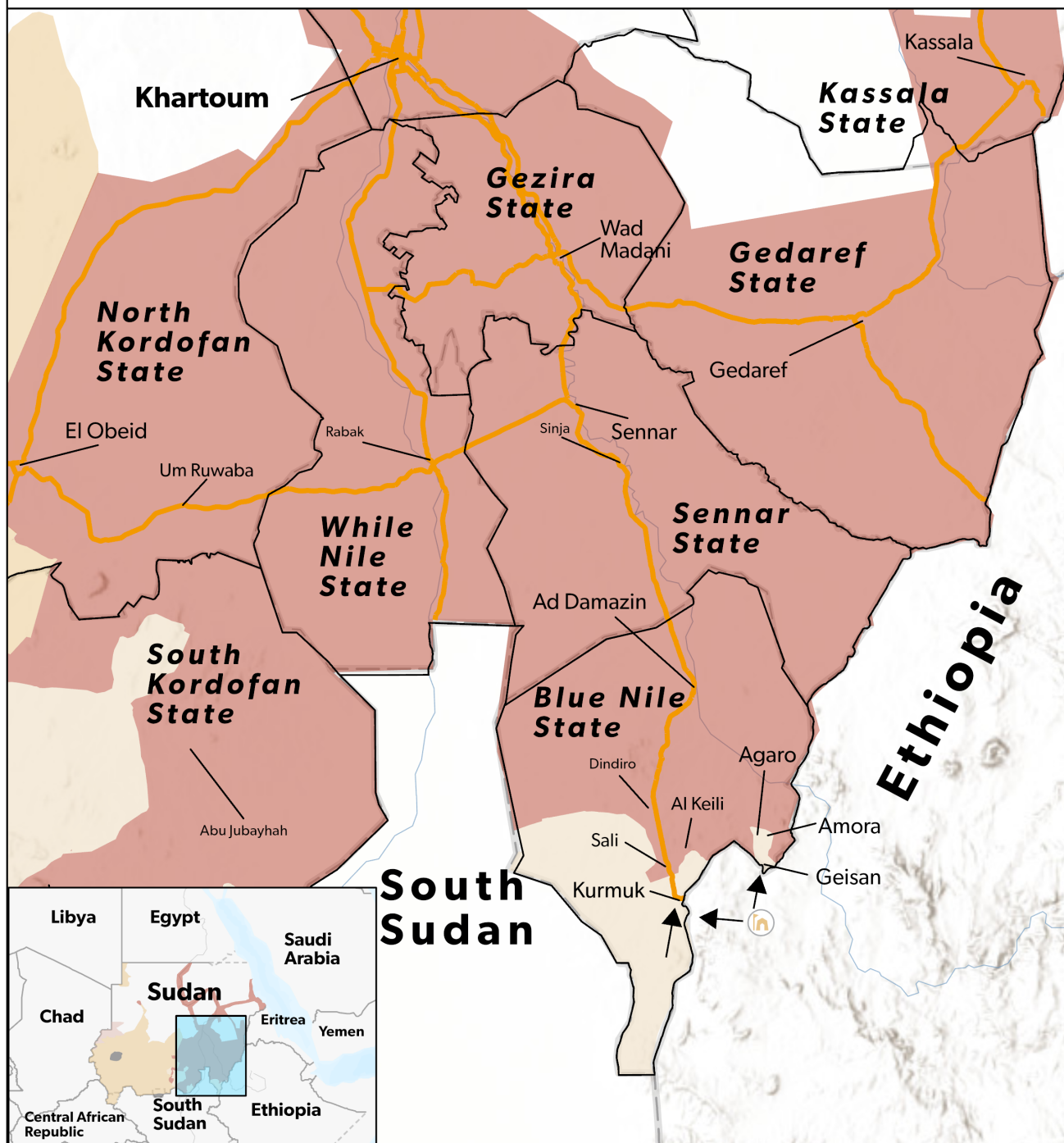
 RSF
 SAF

 RSF Advance



CT CRITICAL THREATS

0 50 100 Miles



Map created by Michael DeAngelo and Liam Karr
© Critical Threats Project at the American Enterprise Institute, August 20, 2026.

Esri, TomTom, Garmin, FAO, NOAA, USGS,
WGS1984 Web Mercator (Auxiliary Sphere)

DRC/ RWANDA.

Fighting between the AFC/M23 and the FARDC and Wazalendo militias continued throughout the week in eastern DRC. In Kalehe, the AFC/M23 retook several settlements, including Tushunguti. In Masisi, M23 took control of three villages under Ufamandu-1, with population movements reported in the area. In Fizi, the FARDC shot down an M23 kamikaze drone, while the fighting demonstrated once again how rapidly the front lines are shifting from week to week.

On the morning of 27 August, an aircraft attributed to the AFC/M23 coalition crashed near the village of Bikuba in Fizi. According to local sources, the aircraft, which regularly operated flights to the high plateaus of Uvira and Fizi, was hit by an unidentified missile. Scattered clashes were subsequently reported in the area.

The DRC Ministry of Communication and Media stated in an official assessment released on 24 August that more than 300 people were killed in mass executions carried out by the AFC-M23 coalition between June and July. The ministry also reported hundreds of cases of rape and forced recruitment. The UN Human Rights Office in the DRC, BCNUDH, documented 657 human rights violations in June, representing a 33% increase.

The same region is also facing the largest Ebola outbreak in its history. Africa CDC Director Jean Kaseya stated on 20 August that the outbreak centered in Bunia was recording 70 to 100 new cases and 50 to 60 deaths per day over the previous 24 hours. More than 2,500 deaths were recorded over the previous three months, while the number of cases exceeded 5,500 as of 25 August. The UN called for a six-month humanitarian ceasefire because the outbreak overlaps with areas affected by the M23/AFC conflict. According to a separate UN report, more than 200 drone incidents and six deaths were recorded in eastern DRC between January and June. The growing use of drones is increasing the risks faced by civilians and humanitarian workers.

According to a UN report, more than 200 drone incidents and 6 deaths were recorded in the region between January and June.

NIGERIA.



President Bola Tinubu pledged on 25 August to confront those responsible for what he described as “barbaric” attacks on four villages in Niger State and ordered a rescue operation. According to RFI, the attackers released a video showing villagers being held hostage. The number of casualties has not yet been confirmed.

In Borno State, a Boko Haram commander surrendered to the Nigerian army on 26 August together with three fighters and a woman. Five days earlier, on 21 August, Nigerian army forces rescued four civilians, two women and two boys, who had been held for three years at the Dogon Chuku terrorist camp.

Retired Colonel Ahmed Usman, security adviser to the Sokoto governor, expressed support on 26 August for the newly established Disarmament-Peace-Security Committee in Zamfara. He stated that banditry in northwestern Nigeria could not be resolved through military means alone.

According to a report published by SBM Intelligence on 27 August, Nigeria recorded 1,713 kidnapping incidents between July 2025 and June 2026. A total of 7,825 people were kidnapped, 1,142 people were killed and the perpetrators collected 7.8 billion naira in ransom. The JAS faction of Boko Haram accounted for 90% of the ransom. This indicates that the group continues to preserve the kidnapping economy as a major source of financing.

SOMALIA.

Between five and ten fishermen were reportedly killed in the strikes off the Nugaal coast. In a separate incident, at least nine people were killed in an airstrike near a vessel held by pirates off the coast of Puntland on 25 August.

Forces loyal to Laftagareen attacked Baidoa on 20 August, reopening a front that the federal government had considered secured. According to Reuters, Somali forces expelled militia elements from the city after heavy fighting. Tensions continued throughout the week, along with reports of a military defection.

Demolitions that began around midnight on 24 August in the Tookiyo neighborhood of Mogadishu's Yaqshiid district turned into clashes between government forces and residents resisting the evictions. Approximately ten people were injured.

Al-Shabaab launched simultaneous attacks on Kenya Defence Forces positions in Yunbis, Garissa, and Sheekh Barow/Fino, Mandera, on the night of 26 August. The group claimed that one KDF soldier was killed and another wounded in Yunbis. An armed group linked to an administration that calls itself "South East Somalia" entered Marka, the capital of Lower Shabelle, on 23 August and raised its flags at key locations. The actual extent of its control could not be independently verified.







**MALI,
BURKINA
FASO,
NIGER.**



Human Rights Watch stated in a report published on 20 August that more than 100 Russian paramilitaries affiliated with the Africa Corps, together with Malian soldiers, carried out a dawn raid on 10 July against Bombori village in the Mopti region, which is controlled by JNIM. The organization documented the killing of nine civilians, including four children. According to Human Rights Watch, the attackers entered homes in the Fulani neighborhood, dragged people outside and gathered at least 80 men and children under a tree. This was the second similar incident documented by the organization within three weeks.

In the San area, an indefinite curfew was imposed from 22:30 to 06:00 on 24–25 August, two weeks after a deadly JNIM attack on a military camp. During the same week, Tuareg separatist fighters released another 22 soldiers captured during coordinated attacks in April and July. Some of the prisoners had been held for more than three years. FAMa forces also conducted a series of operations in eastern Sikasso under “Opération Dougoukoloko,” targeting groups affiliated with the JNIM/FLA coalition. Statements issued during the week reported that approximately 20 militants had been neutralized and that armed group positions near Abéïbara and Sévaré had been targeted.



In Burkina Faso, government sources stated on 24 August that JNIM was recruiting children around the age of ten as scouts, informants or fighters. They attributed this development to the heavy losses suffered by FDS and VDP volunteers during recent operations. According to ADF reporting on 25 August, JNIM fighters were crossing into northern Ghana, near the Burkina Faso border, to receive treatment for their wounds at local hospitals and obtain supplies and weapons before returning across the border. On 23 August, an attack on the Bodana outpost in Kampti killed one civilian and wounded two police officers and one civilian. The border with Côte d'Ivoire was closed, and Ivorian military units were deployed to the area.

In Niger, at least 18 security personnel were killed on 21 August when suspected members of a terrorist group attacked a National Gendarmerie post near the Nigerian border. A day earlier, on 20 August, the armed group known as MPLJ claimed responsibility for an attack on Defence and Security Forces positions in Séguédine in northeastern Niger.

LIBYA.

Tripoli-based Prime Minister Abdulhamid Dbeibeh restructured forces loyal to him on 21 August in an effort to take control of the strategic city of Zawiya, home to a major oil refinery. The move increased tensions between rival factions in the area.

The Libyan National Human Rights Institution submitted a request to the International Criminal Court Prosecutor's Office on 23 August, calling for an investigation into the impact of armed clashes in Al-Zawiya and Surman on civilians. The request was based on evidence collected by its field teams.

Energy sector reports indicated a new wave of drone attacks targeting oil facilities during August. A major gas complex in western Libya was shut down in July following protests, while a senior intelligence official was assassinated several weeks earlier. Despite the unstable environment, the NOC continues to seek new investment from international companies.

SOS Méditerranée stated on 24 August that Libya-linked groups continued to harass migrant rescue vessels in the Mediterranean. It reported at least seven incidents during June and July in which Libya-linked boats approached rescue vessels at high speed or followed them for several hours.



DIPLOMACY

SUDAN.

Sudan's UN ambassador, Al-Harith Idriss al-Harith, told the Security Council on 25 August that Khartoum had, in principle, accepted the US-backed 90-day humanitarian ceasefire proposed by army commander Burhan in active conflict areas. However, he stated that Sudan rejected Western efforts to extend the arms embargo across the country.

On the same day, Denmark, the UK and France supported a proposal to expand the Darfur arms embargo to cover drones and the entire territory of Sudan. China, Russia and Sudan's own representative opposed the proposal. In a speech in Khartoum, Burhan downplayed the potential impact of additional sanctions.

On 27 August, Sudan's Security Affairs Coordination Committee lifted the two-year curfew and state of emergency imposed in Khartoum in 2024. Residents were allowed to move freely throughout the city during the day. Security checkpoints and army patrols remain in place. Foreign nationals are still prohibited from entering Khartoum State except under specific conditions.

The Central Bank of Sudan granted commercial banks broader authority on 25 August to set their own foreign exchange rates and purchase export revenues, removing previous restrictions. The move came as the Sudanese pound faced severe volatility and depreciation on the parallel market.



MALI.

NIGER.

Malian Prime Minister Abdoulaye Maïga met his Algerian counterpart Sifi Ghrieb during a two-day visit to Algeria that began on 24 August. He was also expected to meet President Abdelmadjid Tebboune. Following the meeting, Tebboune invited President Assimi Goïta to make an official visit to Algeria through Maïga. Goïta accepted the invitation.

Nigerien Prime Minister Ali Mahaman Lamine Zeine arrived in Algeria with a large ministerial delegation on 26–27 August. During the two-day visit, he was received by his counterpart Sifi Ghrieb. Algeria also donated four helicopters to Niger's armed forces during the same week. The move formed part of a broader Algeria–Niamey security rapprochement following energy agreements signed between Sonatrach and Niger.

At a strategic conference in Niamey, the three members of the Alliance of Sahel States (AES) officially declared a doctrine of “sovereignty or death” on 20 August. Burkina Faso's Bassolma Bazié stated that “our sovereignty is not negotiable” and presented the phrase as a summary of the alliance's increasingly confrontational rhetoric toward ECOWAS.



DRC/ RWANDA ANGOLA.

President Félix Tshisekedi unveiled a new five-pillar “global defence doctrine” on 20 August during the 10th anniversary ceremony of the Higher College of Strategy and Defence (CHESD). The ceremony was attended by Burundi’s President Ndayishimiye and the defence ministers of the Republic of the Congo and the Central African Republic. One day later, the DRC and the Central African Republic signed two memoranda of understanding on military training and intelligence cooperation, signed by Defence Minister Guy Kabombo Muadiamvita and his CAR counterpart Rameaux Claude Bireau.

Angolan President João Lourenço’s working visit to Kinshasa produced a concrete outcome on 26 August. The DRC signed a 30-year, \$1.258 billion concession agreement with Mota-Engil Africa SA for the railway section of the Lobito Corridor, under the supervision of Tshisekedi and Lourenço. For Kinshasa, the visit reflected an effort to secure economic interests while seeking a way out of the security deadlock in the east. For Luanda, it reinforced its ambition to consolidate its role as a regional power. At a press conference in Kigali, President Paul Kagame reiterated that the root of tensions between Rwanda and Kinshasa has “always been the FDLR in Congo” and warned that



tensions would continue as long as the issue remained unresolved. Two days later, while commenting on the announced disarmament protocol between the DRC and the FDLR, Kagame said he had seen “no initiative that really addresses the root causes.”

Former President Joseph Kabila filed a lawsuit in a US federal court on 21 August against the financial sanctions imposed on him by the US Treasury Department. The move brought the DRC’s internal political confrontation into the international legal arena.



SOMALIA.

Ugandan President Yoweri Museveni threatened on 20 August to withdraw Uganda's approximately 13,000-strong AUSSOM contingent from Somalia because of the country's political turmoil. The threat came as the African Union stabilization mission faced a funding and withdrawal crisis, compounded by declining UN support.

Somali Prime Minister Hamza Abdi Barre praised Ankara's support while marking the 15th anniversary of Somalia-Türkiye relations during the same week. He recalled President Erdoğan's visit to Mogadishu on 19 August 2011 during Somalia's drought and famine crisis. Over the past 15 years, the relationship has expanded from humanitarian assistance into security, education and healthcare cooperation.

Somaliland President Abdirahman stated on 22 August that there were currently no US or Israeli military bases in Somaliland, but said his administration would welcome military facilities from either country in Berbera. The administration aims to use its strategic position on the Gulf of Aden to strengthen its campaign for international recognition.

Somalia's Chief Justice Bashe Yusuf Ahmed ruled on 24 August that the Galmudug regional assembly and local council elections held on 30 July, which were won by the Justice and Solidarity Party, had not been conducted in accordance with the constitution and electoral legislation.



ETHIOPIA.

An Ethiopian delegation led by Brigadier General Teshome Gemechu held bilateral talks at the Pentagon on 19–20 August with Brian J. Ellis, the US Deputy Assistant Secretary of Defense for African Affairs. The two sides agreed to elevate defence cooperation to a “comprehensive strategic” level.

Prime Minister Abiy Ahmed is reportedly seeking a major constitutional change that would transform Ethiopia’s parliamentary federal system into a presidential system. The proposed change could create Ethiopia’s first president with full executive powers for two six-year terms.

On 27 August, Ethiopia renewed its demand for maritime access to the Red Sea and access to a port. The demand had previously triggered strong reactions in Egypt, particularly when discussed alongside the dispute over the Nile dams.

Parties meeting in Tunis under the auspices of UNSMIL initialled a draft agreement mediated by UN Envoy Hanna Tetteh and agreed to meet again in Libya by the end of August.

In talks facilitated by the UN Support Mission in Libya, the parties meeting in Tunis on 20 August initialled a final draft agreement mediated by UN Libya envoy Hanna Tetteh. They agreed to hold another meeting inside Libya by the end of August. Follow-up reports on 27 August indicated that the draft includes the restructuring of the High National Elections Commission as well as constitutional and legal arrangements.

The North Benghazi Court annulled on 20 August a 2006 tourism investment agreement between the Libyan state and Kuwait-based Mohammed Abdulmohsen Al-Kharafi & Sons. It ordered the company to pay Libya 15 billion Libyan dinars in compensation. The court also declared a related 2013 international arbitration ruling invalid both inside and outside Libya. The case had been filed by Osama Hamad, prime minister of the eastern-based government. The Libyan Parliament endorsed the ruling on 22 August.

The Russian Embassy in Italy protested on 21 August against the EU’s Operation IRINI maritime inspections off the Libyan coast. Russia argued that the UN Security Council’s authorization for high-seas inspections had expired in May 2026 and described operations targeting Russia’s

LIBYA.

MOROCCO.

“shadow fleet” as unlawful.

Spanish Prime Minister Pedro Sánchez chaired a special security meeting at the Moncloa Palace on 25 August after approximately 60,000 people crossed from Morocco into Ceuta and at least 100 people died. He declared the situation in Ceuta a “national security issue” and established a coordinated response unit led by Minister Ángel Víctor Torres. Most of those who crossed were returned to Moroccan territory.

The hacker group Jabaroot claimed on Telegram on 24 August that it had leaked a database containing 70,381 records belonging to Morocco’s DGST and DGSN intelligence services. The leak undermined Rabat’s security reputation, which is built partly on intelligence partnerships with approximately 20 African states.

The Moroccan government officially announced the timetable for the 2026 parliamentary elections on 21 August. Candidate registration will begin on 31 August, close on 8–9 September, and the campaign will begin at midnight on 10 September. Voting will take place on Wednesday, 23 September 2026.

Morocco and NATO announced on 27 August that they were deepening cooperation to jointly train African militaries. The move reflected Rabat’s effort to strengthen its position as a security partner across the continent. However, the Jabaroot leak that emerged during the same week raised questions about that security reputation.



NIGERIA / SENEGAL.

The UK's updated travel advisory for Nigeria triggered a regional debate on 25 August. Opposition parties in Kwara cited the warning as evidence of a deteriorating security environment, while officials and residents in Kano, Gombe, Jigawa, Yobe and Kaduna rejected the assessment. In Benue, concerns were raised over the potential impact of the warning on the presence of foreign humanitarian organizations.

The Senegal–Gambia border dispute, which has continued since the Darsilami border incident, has shifted toward technical negotiations without military confrontation following a national document prepared by a Border Committee established during President Macky Sall's tenure. The committee's work points to a rare emerging process for

TUNISIA / ALGERIA.

resolving the dispute in the region. Tunisian President Kais Saied and Algerian President Abdelmadjid Tebboune held a phone call on 23 August following a tragedy off the coast of Zarzis. The two leaders reaffirmed their commitment to coordination on bilateral relations and regional

ENERGY

ALGERIA, NIGER, MOROCCO

developments.

Algeria's state-owned oil company Sonatrach expanded its energy relationship with Niger across the entire value chain within a 72-hour period that included 21 August. The company first launched a four-well exploration drilling program in the Kafra block with its Nigerien partner Sonidep. It then jointly marketed the first cargo of Nigerien-origin Meleck crude through the Sèmè terminal in Benin. Finally, it began supplying Jet A1 fuel from the Adrar refinery to Niger.

Algeria was also under pressure on its own power grid during the same week. On 19 August, electricity demand reached 21,828 MW, the country's fifth summer record. Despite this, Algeria continued exporting electricity to neighboring countries with 26 GW of installed capacity. Sonatrach also reportedly signed an agreement with India's largest refiner, Indian Oil Corporation, for a monthly LPG cargo in 2027.

Morocco sits at the southwestern end of this expanding energy network. The Nigeria–Morocco Gas Pipeline (NMGP), a roughly 6,000-kilometer project launched with King Mohammed VI's visit to Nigeria in 2016 and designed to transport gas to Europe through 13 countries, received a green light from ECOWAS. This is the project's most concrete step forward in nearly a decade. However, financing for the estimated \$25 billion total cost and the construction timetable remain uncertain. The chronic financing difficulties faced by similarly large African projects, such as the Trans-Saharan Gas Pipeline, remain a warning sign for the NMGP.

Gold prices above \$4,000 per ounce have revived abandoned mines in Johannesburg.

Illegal miners known as zama zama have generated activity reminiscent of historic gold rushes. On the institutional side, Gold Fields doubled its 2025 profit, while AngloGold Ashanti's free cash flow tripled to \$2.9 billion during the same period.

In manganese, Afrimat secured an export allocation of 240,000 tonnes per year through the Port of Saldanha for seven years, totaling 1.68 million tonnes. Management described the period as one of the most difficult in the company's 20-year history and said it was prioritizing cash generation and debt reduction.

The company also reported that iron ore volumes remained below expectations. The simultaneous rise in gold prices and structural pressure on manganese and iron ore show that South Africa's mining sector is increasingly divided across commodities.

ALGERIA, NIGER, MOROCCO

Table: Key Mining Developments of the Week

Country	Project /Company	Amount	Details
Niger	Madaouela Uranium (Atomic Eagle – State)	\$40 million credit	State stake increased to 40% — 15% free of charge and 25% financed. Historical resource of 116.5 million lb.
Mali	Gold production, including Loulo-Gounkoto	—	23.5 tonnes in the first half, up 30% year-on-year. Full-year expectation of 43 tonnes.
Rwanda	Nyakabingo Tungsten (Trinity Metals)	\$50 million	Production targeted to triple by 2027. Potential New York IPO could raise \$100–200 million
Ethiopia	Kurmuk Gold Project (Zijin Gold – Allied Gold)	~\$300 million	9.2% stake acquired in a project located in Benishangul-Gumuz near the Sudan border.
Morocco	Louisiana Phosphate Fertilizer Plant (OCP–CHS)	\$450 million	More than 1 million tonnes annual capacity. First new phosphate fertilizer plant in the US since 1984.
DRC	Kipushi Zinc Mine (Ivanhoe Mines)	—	2026 production target of 290,000 tonnes, compared with 203,168 tonnes in 2025. Zinc prices reached a four-year high.
South Africa	Saldanha Manganese Exports (Afrimat)	—	240,000 tonnes per year for seven years, totaling 1.68 million tonnes.

CONCLUSION

The week's conflict, diplomacy, energy and mining developments converge around a single axis: states are expanding their efforts to assert sovereignty while simultaneously increasing the external dependencies that finance those efforts. Niger is taking control of its uranium sector from France while relying on Algeria for security and on Sonatrach's energy agreements for cash flow. The DRC is seeking a way out of its security deadlock in the east while relying on Angola through the Lobito Corridor and remaining dependent on raw mineral exports because it has not yet been able to overcome its electricity deficit. In Ethiopia, Abiy's push toward a presidential system came in the same week that the 40-day National Dialogue Conference concluded with 400 recommendations. Both processes are testing the legitimacy of the same governing model through different mechanisms.

The defining factor is that external actors are no longer operating in a single domain. They are moving simultaneously across security, energy and diplomatic fronts. Algeria's hosting of the prime ministers of Mali and Niger in the same week, its donation of helicopters to Niger and Sonatrach's three separate energy agreements are parts of a single strategy. Türkiye's meeting with Haftar in Benghazi, the 15th anniversary celebrations with Somalia and the decision to deepen cooperation with NATO on training African militaries all came together during the same week. Russia maintained the Goïta-Putin relationship in Mali while joining China in blocking the expansion of the Sudan arms embargo. None of these three actors is focused on a single country. All are becoming involved in several interconnected crises at the same time. This means that the regional balance of power should increasingly be understood not country by country, but along strategic corridors: the Sahel, the Horn of Africa and the Great Lakes.

Vulnerability is also concentrated in the same areas as resource wealth. Zijin's Kurmuk investment is taking place amid Sudan-Ethiopia border tensions. Trinity Metals' tungsten expansion is progressing along the Rwanda-DRC conflict line. Chevron's Sirte agreement is unfolding within Libya's institutional fragmentation. Capital is not ignoring these risks. It is continuing to move without fully pricing them in. The key indicator to watch in the coming weeks will therefore be whether these investments retreat as security conditions deteriorate, or whether the cycle of nationalization and external partnerships continues independently of the crises surrounding it.



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