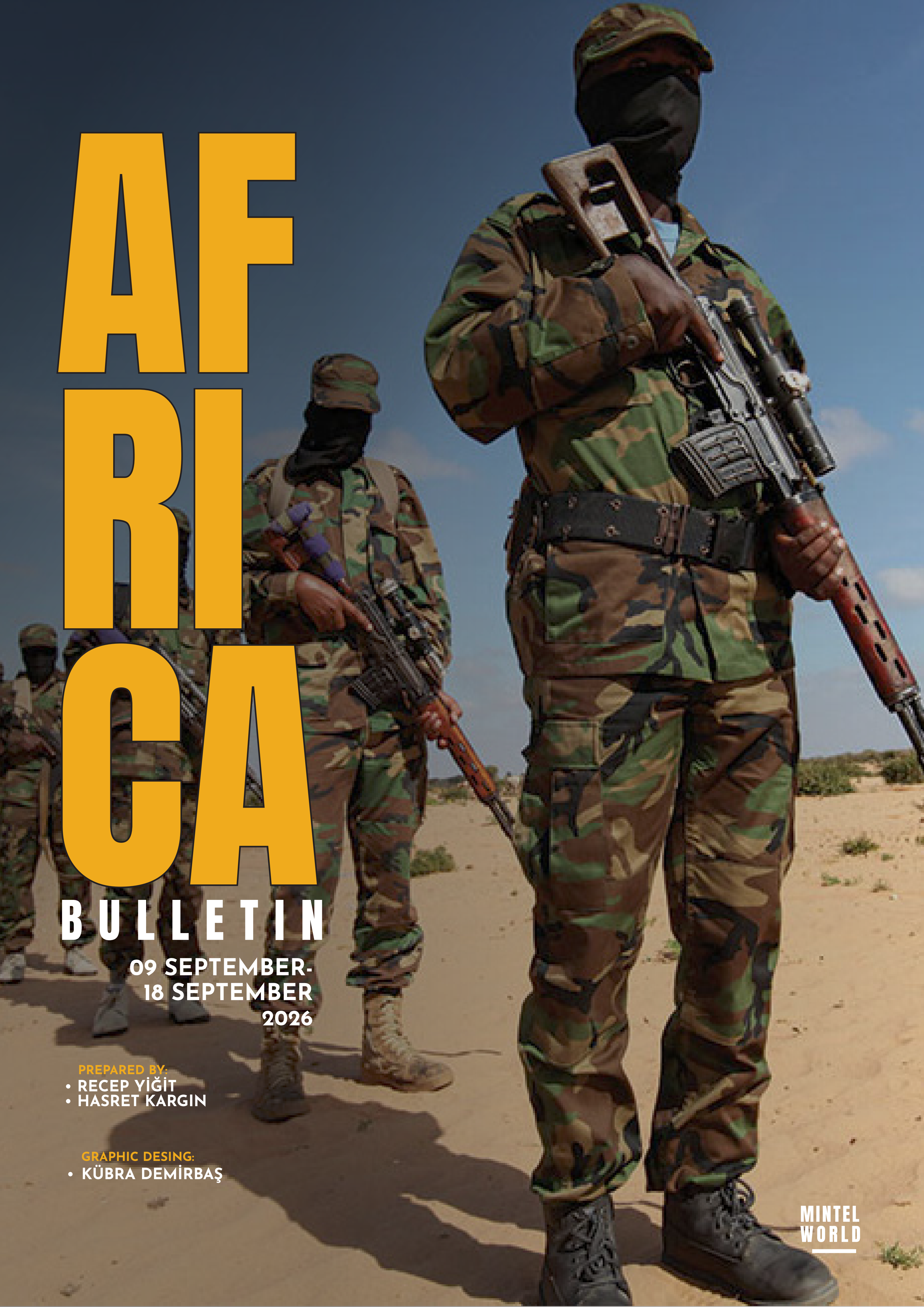

AFRICA BULLETIN

09 SEPTEMBER-
18 SEPTEMBER
2026

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MINTEL WORLD

EDITOR'S NOTE

Covering the period of 9–17 September 2026, this issue focuses on two main dynamics gaining momentum across Africa: military fragmentation on the ground and the intensifying global power competition over critical resources. From Sudan to the Democratic Republic of the Congo (DRC), non-state actors and local militias are expanding their footprint, while direct foreign interventions push these security crises into broader regional dimensions. Simultaneously, the diplomatic rupture between Algeria and the UAE, alongside Türkiye's active mediation in Libya, highlights how Continental diplomatic balances are being redrawn.

Despite the escalating conflict environment, global capital flows into the energy and mining sectors continue unabated. Key external players—including the US, China, Gulf states, and Russia—are consolidating strategic positions, ranging from Angola's oil sector to critical mineral supply lines in the DRC and Zambia. However, the vast discrepancy between official statistics and informal resource flows, coupled with the state's lagging institutional capacity, continues to hinder the translation of resource wealth into broader stability. This bulletin presents a detailed account of this complex picture, where acute security crises and strong economic investment appetite progress side by side.

Levent Kemal

Executive Director, MINTEL WORLD

CONFLICT AND WAR

Sudan.

The siege of El Obeid, the capital of North Kordofan, remained unresolved this week. RSF-linked drones struck the College of Development Sciences and Technology in the city on 9 and 10 September. A security guard was killed, while laboratories and the library were heavily damaged. In the same 48-hour period, drone attacks on Khartoum and Omdurman killed two people in the Dar es Salaam neighbourhood. Falling debris from intercepted drones also caused another death in northern and western Omdurman. In Blue Nile, the army said it shot down an RSF drone in the Belenk area on 13 September. Ed Damazin was also subjected to heavy attacks by explosive-laden drones on the same day.

The Kurmuk, Qeisan and Geissan triangle has changed hands three times in recent weeks. This week, SPLM-N forces aligned with the RSF and the Joseph Tuka faction claimed to have captured six new positions. The army said on 12 September that it had launched a counterattack and pushed RSF forces towards the Ethiopian border. The rapid changes along the front show that military control in the area remains unstable. Civilians continue to be forced to move. Some 3,315 people moved from Kaysan to Wad al-Mahi, while another 1,275 people were displaced from the Um Baru area of North Darfur.

The front line in the Nuba Mountains has also brought a third actor into the conflict. Otoro tribal leaders accused Abdelaziz al-Hilu's SPLA-N forces of carrying out dawn raids on the villages of Ramtala, El-Muqrayh and Kalqa. They alleged that civilians were killed and homes were burned. In Nyala, the killing of a young man in the Kalma camp turned into a revolt. The administrative building was set on fire. In Kadira market in South Darfur, which is controlled by the RSF, the market was completely closed after 35 killings. This shows that the war is no longer developing only along the SAF-RSF axis. Local militias and tribal structures are also becoming increasingly fragmented igüre driving violence within the conflict.

The most serious allegation this week moved into the sphere of accountability. Mohamed Chande Othman, head of the UN Independent International Fact-Finding Mission igüre Sudan, said that allegations that the army had produced chlorine-based igürel weapons could be examined within the mission's mandate. TASIS Interior Minister Suleiman Sandal presented the allegations as part of a broader pattern of targeting civilians by Burhan and allied Islamist groups. Burhan rejected the allegations. The US State Department said sanctions would remain in place until Sudan verifiably destroys its igürel weapons. The timing of the allegation is notable. Figures presented at the UN Human Rights Council during the same week showed that at least 1,120 civilians were killed in drone attacks during the first half of 2026. This accounted for 80 percent of total civilian deaths. The igürel weapons allegations are adding another layer of international pressure to a war that is already increasingly dominated by drone warfare.

DRC / The Great Lakes

Fighting continued this week in North Kivu's Masisi and Walikale areas between the FARDC and Wazalendo volunteers on one side and AFC/M23 positions on the other. Mass displacement and looting were reported in several villages. In Lukanga village in Lubero, the increasingly complex igüre of the conflict became clear when local residents themselves set fire to a Wazalendo position. This shows that the militias are facing tensions with the civilian population they are supposed to protect. The legitimacy problem previously associated with the state is now also emerging among the militias.

A fire at a school in Bukavu's Bagira commune on 11 September caused a stampede that killed many children. Reported figures differ among sources. UNICEF reported that at least 26 children were killed and 25 were injured. AFC/M23 gave a igüre of 24 deaths. Other agencies reported figures ranging from 14 to 17 deaths. These discrepancies show the lack of a central verification mechanism for basic school safety in an area that has been under M23/AFC administration for months.

Institutions and services such as the CADECO tax system, SNEL and REGIDESO have been taken over by the M23/AFC administration. The weakness of the monitoring process under the Washington Agreement also became clear during the same week. During the first prisoner release round in August, 477 detainees were identified, but only 15 were actually released.

Mali / Burkina Faso

At least 50 soldiers and Russian Africa Corps personnel were killed in an attack on the Dioura military camp in Mali›s Mopti region. Some sources put the death toll between 60 and 80. In response, FAMa launched air and ground operations in Dioura, San and Sikasso. FAMa also said that around 1,000 terrorists had been neutralised during the Dougoukoloko operation in August.

The scale of the attack shows that diplomatic gestures recorded in recent weeks, including the exchange of 82 soldiers and the Vézilier amnesty, have not stopped the violence on the ground. During the same week, JNIM ambushed a Russian Africa Corps convoy near Kaka village in Mopti. Thirteen Russian and Malian soldiers were killed. Fourteen motorcycles and six Kalashnikov rifles were seized. This shows that Russia›s military presence in Mali is increasingly becoming a direct target rather than functioning solely as a security guarantee.

In Burkina Faso, JNIM attacks continued along the Natiaboani-Pama axis and in the Youba area of Yatenga. At the same time, President Captain Ibrahim Traoré was seen travelling between Boromo and Bobo-Dioulasso with a security convoy. Opposition sources criticised this as a contrast between the situation at the front and the government›s agenda. In Comoé Province, allegations that a political figure had supplied weapons to a Dozo traditional hunter militia raised questions about whether the state is now openly supporting the arming of militias.

In Niger, the consequences of the 28 and 29 August coup attempt are continuing. Ten days after the mutiny, several Special Forces officers were targeted as part of an investigation by the External Security Intelligence service. The government continued to describe the incident as an attempt by France to destabilise the country. An alleged 12 million litre fuel scandal involving General Moussa Salaou Barmou, who was appointed Chief of General Staff, has also raised questions. Claims that the investigation was stopped once it reached senior figures point to a financial dimension behind the dissatisfaction among junior officers involved in the coup attempt.

Somalia

The US Africa Command conducted two airstrikes against Al-Shabaab on 4 and 5 September. The strikes took place west of Mogadishu and near Kismayo. In Baardheere in the Gedo region, Al-Shabaab launched a heavy attack on a government military base during the night of 9 and 10 September. The attack was supported by mortar fire.

Tensions between the federal government and forces loyal to former South West State leader Abdiaziz Hassan Mohamed Laftagareen in Baydhabo have taken on a military dimension. The government began preparing to deploy additional troops. New airstrikes were also carried out around the city on 13 September. This shows that the struggle over water and resources between Mogadishu and Puntland recorded in previous weeks is now being repeated along the South West axis.

A Wall Street Journal investigation found that cooperation between Al-Shabaab and Yemen›s Houthis has expanded since 2023. The cooperation has moved from arms smuggling towards drone expertise. Anti-Houthi resistance forces in Yemen claimed to have found documents belonging to Somali Al-Shabaab fighters among Houthi casualties in the Red Sea. This indicates that the jihadist front in Somalia is increasingly connected to armed group networks operating across the wider Red Sea region.


Libya/ Ethiopia

Amnesty International stated that at least 30 people had been executed in eastern Libya, in Benghazi and Derna, in cases dating from 2014 to 2018. The executions were carried out by secret military courts based on confessions obtained through torture. At least 50 more people are at risk of execution. This wave, which has continued since 23 August, marks the resumption of executions in eastern Libya for the first time since 2010.

The Dbeibeh government called for an immediate halt. In the south, an armed group called the "Fezzan Revolutionary Force" closed the entire southern border to commercial transport from Algeria to the Libya-Chad-Sudan tripoint in retaliation for the killing of a Tebu youth. These two developments show that despite statements about progress under the 4+4 agreement and the electoral timetable, accountability mechanisms remain ineffective in eastern Libya and central authority remains weak in the south.

In Ethiopia›s Tigray region, three people, including a two-year-old child, were killed in drone strikes in the Hintalo area in southeastern Tigray on the morning of 8 September. The regional administrator described the attack as deliberate targeting of civilians by the federal government. The incident turned the Tigray-federal government tensions covered in last week›s bulletin and the deadlock over the implementation of the Pretoria Agreement into another concrete civilian casualty. In Oromia, the Oromo Liberation Army cited a deadly incident at the Tulu Kapi gold project and threatened local communities with retaliation unless they receive a share of mining revenues. This shows that the link between mining revenues and the financing of armed opposition is becoming increasingly visible in Ethiopia.

Nigeria/ Cameroon/ Mozambique

ISWAP militants attacked the Pulka military base in the Gwoza area of Borno. Operation Hadin Kai forces repelled the attack. An investigation published during the same week revealed that the Nigerian government had been conducting a three-month secret ceasefire with the Bakura Doro-led Boko Haram/ JAS faction since June. The agreement began with the release of 360 civilians abducted from Ngoshe village.

The state's simultaneous military response to ISWAP attacks and covert negotiations with a rival Boko Haram faction represent another dimension of the macro-security divergence discussed in last week's bulletin, where violence continues despite improvements in security statistics. The blocking of opposition presidential candidate Peter Obi's attempt to visit the Yelwata massacre site, where more than 270 people were killed, shows that the security crisis has now become a direct part of the 2027 election campaign. In Cameroon's Far North Region, at least 15 people were killed in a raid on the village of Madegoua near Makary shortly after midnight on 17 September. Armed men entered the village, removed residents from their homes, tied them up and then killed them. No group claimed responsibility for the attack. Both Boko Haram and ISWAP remain active in the area. This makes even the identification of perpetrators difficult and highlights the fragmented structure of the jihadist front in the Lake Chad Basin.

Following the Islamic State-Mozambique's first entry into Niassa, which was covered in last week's bulletin after the 3 September attack on a tourist hunting camp, opposition party Anamola's political coordinator Ilídio Facitela Gustavo was abducted by armed men wearing police uniforms during President Daniel Chapo's visit to Inhambane during the same week. His body was found the following day. Gustavo was expected to testify in the case concerning the 2024 election protests involving opposition leader Venâncio Mondlane. This suggests that the killing may have targeted the political accountability process.

DIPLOMACY

SUDAN

The Quintet Mechanism, led by UN Secretary-General's Special Envoy Pekka Haavisto and consisting of the UN, African Union, IGAD, Arab League and EU, held intensive talks in Khartoum with Burhan, Prime Minister Kamil Idris and Malik Agar between 7 and 11 September. Malik Agar said that stopping the war must come before the political process and that the UAE should be openly identified as a supporter of the rebellion.

The Cairo Declaration forces and civil society coalitions such as the Darfur Women's Platform and Sudan Civil Convergence Routes rejected Burhan's proposed "Sudanese-Sudanese dialogue" on the grounds that it would legitimise the reality created by the war. On 12 September, the UN Security Council adopted Resolution 2828. It extended the arms embargo and sanctions on Darfur until 9 October and technically extended the mandate of the Panel of Experts until 9 November. It did not introduce a new sanctions mechanism.

Amjad Farid claimed that the UAE had used its influence at the UN Security Council to block the referral of a report containing evidence of UAE support for the RSF to the sanctions committee. This allegation came during the same period as Algeria's decision to sever relations with the UAE, discussed below, placing further pressure on the UAE's regional position from multiple directions. On 10 September, Switzerland joined the EU's July decision and imposed a ban on the purchase and transit of Sudanese gold.

This represents an extension beyond Europe of the EU-UK pattern of gold sanctions recorded in previous weeks. On 12 September, Eritrea accused Ethiopia of providing shelter and training to the RSF. This coincided with a Yale research unit identifying an Ethiopian base near the Sudanese border as an RSF support point. This gives a new concrete dimension to the regionalisation of the Ethiopia-Sudan-Eritrea question that emerged in previous weeks.

ALGERIA

Algeria severed diplomatic relations with the UAE on 10 September. The Foreign Ministry cited an "increase in provocative and hostile actions" as the reason. The following day, the Defence Ministry announced that Algerian airspace would be closed to all UAE civilian and military aircraft except passenger flights. The UAE ambassador was given 48 hours to leave the country. Algeria's accusations that the UAE was destabilising Libya, Sudan and Mali are notable because all three countries are part of Algeria's own security environment. During the same week, Algeria became the first foreign customer to acquire Russia's Su-57E stealth fighter aircraft. This shows that the break with the UAE is taking place alongside closer military ties with Russia.

In the opposite direction, Algerian Prime Minister Sifi Ghrieb made a 24-hour official visit to Bamako on 14 September and met Mali's military leader, General Assimi Goïta. This was the first high-level contact since the 2025 drone downing crisis and represented a concrete diplomatic outcome of the airspace reopening noted last week. Algeria's simultaneous break with the UAE and rapprochement with Mali shows that the country's emergence as a second external support layer for the AES bloc alongside Russia is accelerating. This is a direct continuation of the pattern identified in last week's bulletin concerning the AES shift towards Russian and Algerian support.

Following the 4+4 Small Meeting agreement of 30 August, House of Representatives Speaker Aguila Saleh and High Council of State President Mohamed Takala met in Ankara on 11 September under Türkiye's auspices. They agreed that the next meeting of the 6+6 committee would also be held in Türkiye. This shows that Türkiye's mediation role in Libya's electoral roadmap negotiations is moving alongside the roles of Russia and the UN.

During the same week, Russian Deputy Foreign Minister Georgy Borisenco also met with Libya's ambassador and reiterated the emphasis on a "comprehensive solution based on national reconciliation." Presidential Council President Mohamed al-Menfi opposed an indefinite extension of the transitional period and called for elections to be accelerated. This shows that the Menfi-House of Representatives Speaker tension remains an active issue on the monitoring list.

Egyptian Foreign Minister Badr Abdelatty also stated that Cairo opposed the division of Libya and supported its territorial integrity. During the same week, Turkish defence industry company MKE announced that it had established a fully owned subsidiary in Cairo. The company aims to turn Egypt into a production hub for African and Gulf markets. This shows that while Egypt is maintaining diplomatic distance from Türkiye over Libya, commercial rapprochement is continuing. The two aspects of the relationship are progressing separately.

LIBYA

DRC/ RWANDA

On 16 and 17 September, delegations from the DRC and Rwanda met in Geneva for the seventh meeting of the Joint Security Coordination Mechanism, mediated by the United States, Qatar, Togo and the African Union Commission. The process was confirmed to be effectively stalled because Rwandan forces have not withdrawn, the FDLR has not been dismantled and the M23-Congo negotiations have failed to reach a peace agreement.

This represents the seventh repetition of the pattern in which the coordination process has failed to produce results. It is also the fifth unsuccessful coordination meeting since the one-year milestone on 27 June. The pattern is therefore becoming structural rather than exceptional. US Africa Advisor Massad Boulos reiterated Washington's commitment to a peaceful resolution of the crisis during the same week.

However, this position did not produce a concrete outcome in the Doha process, where a monitoring report found that only 15 of the 477 identified detainees had been released.

EGYPT/ ETHIOPIA

The Nile Basin Cooperation Framework Agreement entered into force with the signatures of seven upper-basin countries. Former Ethiopian Minister of Water and Energy Alemayehu Tegenu said that Egypt's refusal to sign the agreement would not derail the process. A former US Assistant Secretary of State for African Affairs also stated that Egypt should abandon its positions from the nineteenth and twentieth centuries and move towards a win-win agreement with Ethiopia.

This means that for the first time in the decades-long dispute over Nile waters, the upper-basin countries have begun implementing a common legal framework without waiting for Egypt. In contrast, Egypt and Sudan increased their cross-border electricity interconnection capacity to 75 megawatts during the same week.

They agreed to raise it to 300 megawatts in the second phase and to 1,000 megawatts as the final target. This shows that Egypt is attempting to balance its position in Nile diplomacy by deepening energy cooperation with Sudan.

DJIBOUTI

Djibouti became the 72nd country to join the Artemis Accords at a ceremony held at NASA Headquarters in Washington. It also took over the management of a strategic humanitarian logistics base from the UN World Food Programme.

During the same week, the 74th Extraordinary Session of the IGAD Council of Ministers was held in Djibouti. Sudan used the platform to seek support for an internal political dialogue independent of external intervention. Djibouti, Somalia, Sudan and 11 other countries confirmed their formal participation in the Multinational Maritime Defence Alliance, which aims to protect maritime traffic in the Bab el-Mandeb Strait, the Gulf of Aden and the Red Sea.

This institutionalisation coincided with the arrival of approximately 1,400 Yemenis in Djibouti within 24 hours after the Houthis captured Mokha and Perim Island. The region is therefore building a security architecture while also directly absorbing the humanitarian consequences of the war in Yemen.

Eritrean Foreign Minister Osman Saleh accused the UAE during the same week of pursuing "port colonialism" in Red Sea ports and issued a strong warning against the possibility of Israel establishing a military base in Somaliland. This represented an explicit diplomatic response to the Gulf-Israel competition in the Horn of Africa

Spanish Prime Minister Pedro Sánchez declassified around 40 intelligence documents prepared before the mass migrant entry of 30 and 31 July. The documents contained warnings about a "mass entry". Tens of thousands of people crossed from Morocco into Ceuta and Melilla over those two days, and at least 19 migrants died.

Morocco's Foreign Ministry rejected on 11 September allegations that its officials had facilitated the crossing. It argued that Spanish political circles were using the issue for domestic political purposes. This shows that the contradiction between the "state guidance" allegation recorded in previous weeks and the government's "there is no evidence" defence is now continuing at the documentary level.

The Moroccan Association for Human Rights brought the issue before UN special rapporteurs and the Spanish Embassy in Rabat during the same week, moving the crisis towards a multilateral accountability process.

MOROCCO

SOUTH AFRICA

US Secretary of State Marco Rubio announced visa restrictions on senior South African officials and their family members, citing South Africa's "expropriation of land without compensation" and its black economic empowerment laws. This represents the most concrete diplomatic sanction of the year so far in the Pretoria-Washington relationship. During the same week, Ghana announced that it had repatriated 1,964 of its citizens between May and September because of the wave of xenophobic violence in South Africa, spending approximately $4.36 million in the process.

Ghana also said it planned to establish a diaspora consular fund for future crises. This shows that the front formed by Ghana, Uganda and Nigeria against South Africa, which has remained on the monitoring list, has now turned into a concrete financial cost. Kenya experienced a reverse version of the same pattern. Following President William Ruto's decision to close small-scale retail and street vending to foreigners, hundreds of Burundians went to their embassy in Nairobi to obtain travel documents.

The government apologised to the Burundian community over the harassment. One analysis assessed that the decision had developed into a regional crisis testing the East African Community's common market integration. This shows that the wave of xenophobia is no longer a one-way pattern moving outward from South Africa. It is becoming a simultaneous and reciprocal pattern across different parts of the continent

ENERGY

ANGOLA

Angola experienced some of the continent's most intensive diplomatic and commercial activity in the oil and gas sector during the week of 9 to 17 September. The Angola Oil & Gas AOG 2026 conference in Luanda announced the country's new Hydrocarbon Strategy extending to 2050 and projected more than $70 billion in upstream investment. NJ Ayuk, President of the African Energy Chamber, announced that Afreximbank and the African Petroleum Producers' Organization APPO would launch the African Energy Bank in November. The institution aims to provide the continent's oil and gas companies with their own financing architecture.

Concrete results also emerged on the ground. New data was released on the Vicango Este-01 discovery announced in last week's bulletin. The well identified a 25-metre sandstone layer containing high-quality hydrocarbons. Block 15 has produced more than 2.7 billion barrels since 2003. Angola's oil and gas agency ANPG signed deepwater risk service contracts in the Kwanza and Congo basins with Shell, Equinor and Sonangol E&P.

Qatar's state energy company QatarEnergy entered Angola for the first time by acquiring a 30 percent stake in Blocks 8 and 22. Shell remains the operator with a 50 percent stake, while Sonangol P&P holds the remaining share. Indonesia's Pertamina also moved in a similar direction. It is seeking an operator role through Maurel & Prom rather than remaining solely a crude oil buyer. Angola accounted for 15.41 percent of Indonesia's crude oil imports during the first half of this year.

This picture represents the energy dimension of last week's Angola-DRC Atlantic corridor development. Afreximbank organised a forum in Angola highlighting $5.18 billion in oil, gas and industrial opportunities. Of this amount, $2.5 billion was allocated to Lobito Oil and $1 billion to Sonangol. The aim is to move local companies beyond the role of service providers towards ownership and large-scale operations. Localisation, however, remains behind the target.

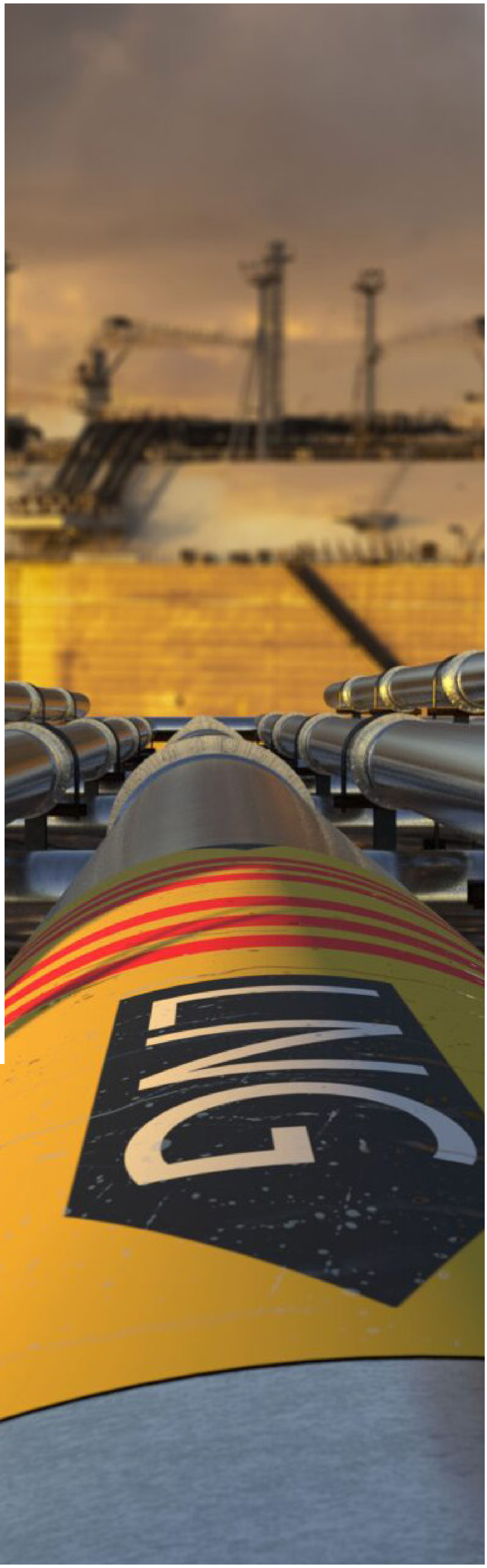
Although 70 percent of TotalEnergies' contracts are held by Angolan suppliers, these companies account for only 7 percent of sector spending. Local participation remains stuck at 12 percent, while the target for 2027 is 20 percent. This gap stands in sharp contrast to China's capital weight in the Lobito-Zambia-DRC copper corridor. Angola is rapidly bringing external capital from Qatar, Indonesia and Afreximbank into the country, but it is not expanding its own private sector at the same pace. This is deepening the structural gap between the country's energy wealth and its industrial capacity.

MOZAMBIQUE

A consortium of Saipem and Jan De Nul signed a letter of intent with ExxonMobil Mozambique for the first phase of Rovuma LNG. The agreement, worth approximately €11 million, covers the front-end engineering work for an EPCI contract that will connect 18 subsea wells to the onshore liquefaction facility in Palma.

Maputo will host the Africa Gas and LNG Summit from 11 to 13 November. This places Mozambique at the centre of the continent's gas investment debate. During the same week, an IMF delegation arrived in Maputo to discuss a new financing programme. The fifth and sixth reviews of the $456 million loan approved in 2022 were abandoned in 2025. The two sides are now attempting to rebuild the relationship from the beginning.

Energy investment is also inseparable from security risks. The Islamic State-Mozambique's first entry into Niassa, covered in last week's bulletin, is now extending the region's security costs towards the LNG corridor.



LIBYA

Libya experienced two parallel realities on the energy front this week. On one side, the Petroleum Facilities Guard PFG threatened to halt production at seven fields in the southwest, including Sharara and El-Feel. The reason cited was unpaid salaries and unmet demands. During the same week, teachers, healthcare workers and oil facility guards employed by the Tripoli-based government began protests demanding wage increases.

The simultaneous mobilisation of these three groups shows that perceptions of unfairness in the state's distribution of salaries are now spilling over into the oil sector. On the other side, Libya reported $15.2 billion in oil and gas revenues for the January-August period. Of this amount, $11.9 billion came from crude oil exports. Benghazi economist Atiya al-Fituri drew attention to the fact that the $15.2 billion transferred to the Central Bank was lower than the $15.8 billion recorded during the same period last year. This is despite oil prices reaching the $90 to $100 range this year while they did not exceed $70 last year. The question is where the lost revenue is going despite the higher oil price.

Brent crude oil exceeded the $100 threshold for the first time since July during the same week. This created a dual effect for Libya by increasing export revenues while also raising the cost of imported fuel. Despite this, Libya retained its position as the country with the world's cheapest petrol, at $0.02 per litre, ahead of Venezuela. On the structural side, the joint venture between Turkish steel producer Tosyalı and Libya's SULB confirmed that a $2.5 billion low-carbon direct reduced iron DRI facility in Benghazi will begin production in early 2028. Ninety percent of production will be exported.

The timing of the project coincides with the final stage of the EU's Carbon Border Adjustment Mechanism CBAM, which will cover iron and steel imports. This means that the capacity to sell low-emission steel to the European market could provide Libya with both economic diversification and alignment with EU requirements. Schlumberger SLB announced on the centenary of its 70-year presence in Libya that it would renew its partnership with the National Oil Corporation and increase investment.

AGOCO is also discussing the expansion of drilling and software contracts with Baker Hughes. This institutional deepening in the energy sector is taking place alongside the political uncertainty created by the 4+4 electoral agreement signed on 30 August. Investors appear to be choosing to position themselves without waiting for the electoral timetable.

SUDAN

Sudan's energy sector is showing a paradoxical revival while the civil war continues. Saudi Arabia's Twaik Group signed a memorandum of understanding with Sudan's Ministry of Energy and Petroleum for the repair of the Khartoum refinery and the construction of a new high-capacity refinery in Port Sudan. During the same week, a Turkish energy company submitted a proposal to Sudanese authorities for investment in liquefied petroleum gas import, storage and distribution infrastructure.

The Sudan-Egypt cross-border electricity connection was increased to 75 megawatts. The two countries aim to raise capacity to 300 megawatts in the second phase and ultimately to 1,000 megawatts. The repair of transmission lines damaged by the war is also part of the agreement. Sudanese oil company Zuwayl announced that it had resumed production at its own fields after a three-year interruption, reaching 10,000 barrels per day.

Against this investment appetite, international pressure over war financing through gold is intensifying. Switzerland joined the sanctions regime launched by the EU in July and banned the purchase, import and transit of Sudanese gold as well as the export of certain chemicals used in mining. In El Obeid, a college was hit this week in a drone attack attributed to the RSF.

The laboratories and library were heavily damaged. External investment in energy infrastructure and the continuation of the war economy through gold are continuing as two parallel realities in the same country. This structurally overlaps with the selective state legitimacy model of M23/AFC in the Great Lakes. See the Mining section on the DRC.

On 10 September, Algeria severed diplomatic relations with the United Arab Emirates, citing repeated "provocative and hostile behavior" from Abu Dhabi. The following day, it closed its airspace to all Emirati military and civilian aircraft, with an exception for commercial flights operating under contracts valid until the end of the year. The rupture can be read as a significant break in Algeria's relationship with Gulf capital and as the spillover of regional influence competition into Algeria's own diplomatic line, particularly amid allegations of UAE support for the RSF and its proxy influence in Libya.

On the energy front, Algeria continues efforts to reduce its dependence on hydrocarbons. Non-hydrocarbon growth rose from 4.8% in 2024 to 5.4% in the first half of 2025, with the government focusing on agribusiness, manufacturing, infrastructure and mining. Oil and gas revenues, however, remain the backbone of exports and public finances.

During the same week, Algerian Prime Minister Sifi Ghrieb visited Bamako. This was a direct continuation and deepening of the Algeria-Mali normalization process seen in recent weeks, including the resolution of the airspace crisis and the return of ambassadors, while strengthening the diplomatic pillar of Algeria's role as a "security architect" in the Sahel.

ALGERIA

NIGERIA

The Dangote Petroleum Refinery reported $1.82 billion in after-tax profit for the six months through June, a sharp turnaround from the $476 million loss recorded for all of 2025. The company also launched its initial public offering process. Priced at €0.35 euro per share, the move aims to make even drivers and security guards shareholders and will reduce Aliko Dangote's controlling stake from 87.27% to 84.39%. Although the refinery has a processing capacity of 650,000 barrels per day, it is struggling to secure domestic crude supplies and had to rely on $3.74 billion worth of imported crude in 2025. This has led Nigerian refineries to demand a permanent domestic supply framework from the Tinubu government.

On the structural risk front, a report by the E3G think tank projected that Nigeria's oil revenue could fall by more than 60% from 2030 as global oil demand shifts toward electric vehicles. This highlights the tension between the medium-term vulnerability of energy revenues and the macroeconomic improvement narrative reflected in last week's Frontier Market reclassification. The trade surplus rose by 101%, while crude oil remains the country's largest export item. NNPC also announced plans to establish 70 multi-energy stations combining fuel, electric vehicle charging and solar power, highlighting an effort to diversify domestic energy demand.

SOUTH AFRICA

South Africa's economy contracted by 0.2% in the second quarter, ending a six-quarter growth streak. The main driver was a 3% decline in mining production. July data showed mining output falling 7.5% year-on-year, with declines of 13.5% in platinum group metals, 7.5% in coal and 8.1% in iron ore. This coincides with cyclical fluctuations in the global platinum market, which recorded a second consecutive surplus in the second quarter of 244,000 ounces but is expected to return to a deficit in the second half of the year.

In the energy sector, the private sector is increasingly taking the lead. According to BloombergNEF's South Africa Transition Factbook, 73% of the 2.3 gigawatts of solar and wind capacity expected to be added in 2026 will be financed through corporate power purchase agreements rather than government tenders. This will be the first year in which private-sector procurement overtakes government-led procurement. Puma Energy sold a 30% stake to local empowerment partner Black Heritage Investments. Sasol, meanwhile, will supply sustainable aviation fuel produced from used cooking oil for $120,000 luxury flights from Cape Town to Antarctica, a niche but symbolic step in South Africa's energy transition.

MINING

DRC

Ivanhoe Mines increased the copper resource at its Western Forelands project by 30%, bringing it to 1.11 million tonnes in the indicated category and 11.01 million tonnes in the inferred category. Company founder Robert Friedland told Bloomberg that US technology giants had shown "unusual interest" in the project. However, Ivanhoe's 8 September resource update did not name any technology companies. Only 0.9 million tonnes of the 12 million tonnes of copper at the Makoko deposit are currently in the proven category. S&P Global had also downgraded Ivanhoe to B- in May. This is one of the clearest indicators of how copper is becoming a strategic commodity due to global demand from digital infrastructure, including data centers and AI hardware. Direct interest from Big Tech in the mining supply chain is bringing the DRC further into the center of China-US supply chain competition.

According to a new IEA report, Africa's lithium production increased by 44% in 2025, bringing the continent's share of global production to 14%, 26 times the 2020 level. With the approximately $1 billion Manono project, the DRC is the country closest to becoming Africa's third-largest lithium producer after Zimbabwe and Mali. China's Zijin Mining is targeting annual production of 1 million tonnes of spodumene concentrate.

At the same time, Kinshasa is tightening control over geological data. Spanish company Xcalibur's $180 million mapping contract covers 700,000 square kilometers, while the national geological data bank is expected to become fully operational by the end of the year. This expands the persistent parallel-state pattern tracked in recent weeks, including the CADECO tax system and the continued opening of the Lonshi border crossing, into the field of mining data sovereignty. While the state remains unable to close its security gap, it is tightening control over resource data.

ZAMBIA

Vedanta-owned Konkola Copper Mines signed a $498 million agreement with Chinese engineering firm NERIN Engineering to build a recovery facility at its copper belt operations in Chingola, adding 70,000 tonnes of annual production. This represents a concrete step toward Zambia's target of increasing annual copper production to 3 million tonnes by 2031. During the same week, Hungary-based EnerSynk signed a 25-year power purchase agreement with ZESCO, adding a new 500-megawatt solar project to the pipeline. ZESCO has signed agreements for 1 gigawatt of solar capacity over the past several months, with a target of 3,000 megawatts by 2030.

The most striking data, however, emerged in gold trade. The UAE reported importing 29.1 tonnes of gold from Zambia in 2023, worth $1.79 billion, while Zambia's Ministry of Mines recorded only 2.24 tonnes of production for the same year. This tenfold discrepancy has prompted the Zambian government to consider reducing the 16% VAT on gold and establishing a new state gold trading agency.

The pattern points to the same structural problem seen in Mali's JNIM-Intahaka gold economy and the RSF's gold financing in Sudan. The gap between official state statistics and actual resource flows demonstrates the scale of the parallel economy created by informal mining across the region. Following his re-election in August, Hichilema retained Finance Minister Situmbeko Musokotwane, signaling continuity in the country's debt-exit process.

GUINEA

State-owned Nimba Mining and Glencore signed a five-year bauxite pre-financing and offtake agreement worth more than $300 million. Glencore will market 10-12 million tonnes of bauxite annually. Guinea's Minister of Mines, Bouna Sylla, said the agreement could open the door to a broader partnership covering alumina refining and energy.

Having overtaken Australia to become the world's largest bauxite producer, Guinea is also building the legal and financial architecture of an intergenerational sovereign wealth fund with SouthBridge, KPMG, A&O Shearman and Sylla & Partners.

The fund is expected to receive $4 billion between 2029 and 2035. Following the first Simandou shipment, which was highlighted last week, this represents the bauxite-side extension of Guinea's effort to institutionalize resource revenues. However, it remains unclear whether the raw-material export model will evolve toward higher-value production such as batteries and alumina.

RWANDA-MALAWI

US-based Almonty Industries signed a binding agreement with the Rwandan government. Rwanda will acquire a 25% stake in the local entity by contributing an exploration license and a processing license, while Almonty will retain the remaining share. The agreement is part of efforts by the US and its allies to establish a Western-aligned supply chain in response to China's global dominance of tungsten.

Rwanda's direct partnership with a US mining company in the critical minerals sector shows that Kigali can continue attracting Western capital within its own territory despite the M23/AFC's control in eastern DRC. This dual reality, involving regional proxy conflict alongside direct foreign investment, represents another dimension of the resource-security nexus in the Great Lakes.

In Malawi, Sovereign Metals has rebranded the Kasiya project as a "Critical Minerals Project" that carries rare earth potential in addition to rutile and graphite. The scoping study found that adding rare earth recovery would require an additional $29 million in investment, generate approximately 2,626 tonnes of monazite-based rare earth concentrate annually and add $722 million to the pre-tax net present value. This addition could raise Kasiya's total value to $2.9 billion and potentially make the project an important node in US and allied efforts to find critical mineral suppliers outside China.

Australian company Bannerman Energy raised A$124 million, approximately $89 million, to complete construction of the Etango uranium project in Namibia. The overseas arm of China National Nuclear Corporation (CNOL) has committed to taking 60% of production. The project targets annual production of 3.5 million pounds of uranium for 15 years.

In Botswana, mining chemicals importer Kemcore received environmental approval for a manufacturing facility in Gaborone. The plant will supply chemicals such as sodium metabisulfite to copper-cobalt mines in the DRC and Zambia.

Financial close is targeted for December 2026, with production expected to begin in the first half of 2028. Together, these developments show that the critical mineral supply chain is no longer limited to ore extraction. Chemical inputs and processing capacity are also becoming areas of regional competition.

NAMIBIA AND BOTSWANA

CONCLUSION

This week's energy and mining picture shows the same structural pattern recurring across different geographies. External capital is entering resource supply chains rapidly, but the state's ability to convert these revenues into institutional capacity, security or domestic industrialization is not advancing at the same pace. In Angola, 70% of TotalEnergies' contracts are held by Angolan companies, yet these firms capture only 7% of spending. In Zambia, official gold production stands at 2.24 tonnes while the UAE reported 29 tonnes of imports from the country in the same year. In Libya, oil prices have risen to the $90-100 range while revenues reaching the central bank remain below last year's level. These three cases show that the gap between resource wealth and fiscal and institutional transparency is widening simultaneously in three of Africa's most energy- and mineral-intensive economies.

The positioning of external actors is also multi-directional. China is moving simultaneously through Zijin Mining in lithium in the DRC, NERIN Engineering in copper in Zambia and CNOL in uranium in Namibia. Beijing's critical minerals strategy therefore covers an entire supply chain rather than a single mine. The US and its allies, meanwhile, are establishing alternative supply lines through Almonty in tungsten in Rwanda, Sovereign Metals in rare earths in Malawi and niobium at Mrima Hill in Kenya. These are concrete new examples of the "China-US raceaway" pattern tracked in previous weeks. Gulf capital is also appearing in three different forms. Qatar is entering oil operations in Angola, Saudi Arabia is building a refinery in Sudan amid war, while Algeria is simultaneously cutting diplomatic ties with the UAE and closing its airspace. The position of Gulf states in Africa is therefore no longer shaped by a single bloc. It is increasingly defined by country-specific interests that are independent and at times contradictory.

The resource-security nexus also produced concrete evidence this week. In Sudan, Saudi capital is repairing the Khartoum refinery while a college in El Obeid is hit by a drone attack. As the war economy continues to operate through gold, Switzerland joins the EU sanctions regime. In the DRC, Kinshasa is tightening geological data sovereignty while universities remain closed in M23/AFC-controlled areas, yet the Lonshi border crossing remains open for mining traffic. In Libya, oil facility guards are striking at the same time as teachers, while the Turkish-Libyan partnership advances a $2.5 billion steel investment in Benghazi. These three cases confirm the "selective withdrawal of state legitimacy" identified in previous weeks. The same dual pace is operating in the mining and energy sectors, with security and public services retreating while resource infrastructure continues to retain investor confidence.

Among the items on the open tracking list, Algeria-Mali normalization advanced through a new concrete step this week. The Algerian prime minister's visit to Bamako moved last week's assessment of "tactical dialogue" to the institutional level. However, Algeria's simultaneous rupture with the UAE shows that this normalization has not broadly reduced regional isolation. Instead, it is building selective partnerships. The question of Botswana's controlling stake in De Beers saw no development this week and remains under observation. Zimbabwe's planned January 2027 ban on lithium concentrate exports also did not feature this week. A new question has emerged, however: whether Zambia's attempt to formalize informal gold flows, given the discrepancy between the 29 tonnes reportedly sent to the UAE and the official 2.24 tonnes, could establish a regional precedent. Especially in light of similar gold-and-armed-group economies in Mali and Sudan, this is a pattern to monitor in the coming weeks.

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