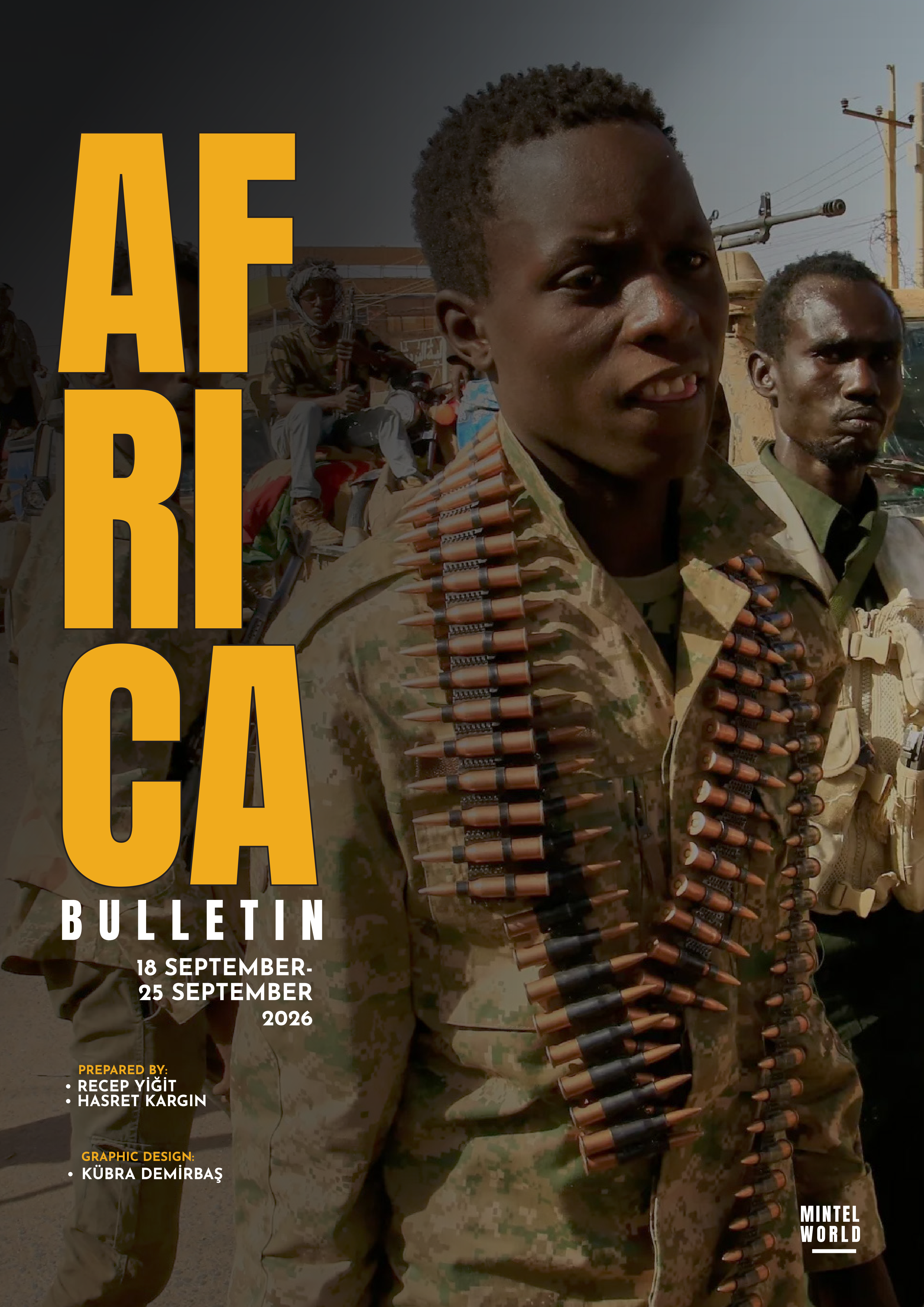

AFRICA BULLETIN

18 SEPTEMBER-
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2026

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MINTEL WORLD

EDITOR’S NOTE

This Week Across Africa (18–25 September 2026) has witnessed critical developments where conflict dynamics, diplomatic engagements, and global capital flows simultaneously gained momentum. While severe security crises and humanitarian tragedies persist—such as the unresolved siege of El-Obeid in Sudan and the risk of clashes in Tigray escalating into a full-scale war—rising jihadist attacks and internal military turbulence in the AES states further deepen regional vulnerability. Nevertheless, Sahel administrations maintaining selective dialogue channels with Western actors, alongside the undeterred influx of massive energy and mining investments from China, the Gulf, and the West (such as TotalEnergies’ $10 billion commitment in Angola or uranium projects in Niger) despite security gaps, once again underscore the continent’s geopolitical and geoeconomic significance. Consequently, Africa continues to be the focal point of global powers and competing capital groups within a paradoxical equation shaped by weakening state capacities and high resource potential.

Levent Kemal

Executive Director, MINTEL WORLD

CONFLICT
AND
WAR

Sudan

The siege of El-Obeid remained unresolved this week. The RSF launched a new attack on Abu Qoud, west of the city, effectively contradicting the army's claims of a large-scale advance. The army, meanwhile, announced on 20 September that it had shot down a "strategic" RSF drone. Justice Africa Sudan warned on 19 September that the country was being deliberately pushed into famine by the warring parties. The Sudan Doctors' Union reported that the health system was nearing collapse, while laboratory and hospital capacity continued to deteriorate due to the war.

The Blue Nile front continued to deepen the regional dimension of the conflict. Heavy clashes took place in the Al-Kili area between TASIS-linked forces and the army. The army also announced that it had destroyed nine RSF vehicles in the area and neutralised a number of its members. In Abyei, clashes between the Ngok Dinka and Misseriya communities left 26 people dead and 82 injured. The UN strongly condemned the violence and pointed to the inadequacy of the security mechanism in the area.

Burhan's rhetoric is no longer limiting the war to the military front. Speaking after Friday prayers, Burhan described the economic crisis as a "war to be won" and characterised inflation and shortages of resources as a new front of the conflict. During the same week, TASIS officials rejected claims that the army was withdrawing and argued that their forces remained strong on the front.

This competing narrative reflects the physical uncertainty on the ground. Following Sudan's rejoining of IGAD, the organisation renewed its call for an unconditional ceasefire. However, no concrete mediation breakthrough emerged after the previous week's inconclusive Khartoum tour by the Five-Party Mechanism.

The situation in South Sudan also remains fragile. While the army claimed to have retaken Kirir, Salva Kiir dismissed the chairman of the electoral commission. The change came three months before the election scheduled for 22 December. One faction of the SPLM-IO claimed that groups linked to detained First Vice President Riek Machar were planning to join the RSF. This increases the risk of the Sudan war spilling into South Sudan's political crisis. UN human rights experts said that, as the country approaches its tenth anniversary, conditions remain unsuitable for a peaceful and credible election.

DRC / Rwanda

The frontline in eastern Congo remained fluid this week. FARDC forces and Wazalendo militias were reported to have clashed with AFC/M23 in the Nyamaboko area of Masisi, with heavy weapons fire heard from night until morning. Clashes also resumed around Ngululu.

In Ituri, ISCAP claimed that it had attacked an army barracks in Pumzika and clashed with a patrol in a separate incident. These attacks once again showed that the security front in Ituri is expanding independently while remaining overshadowed by the M23/AFC crisis.

A report published by Amnesty International on 21 September documented serious human rights violations by M23 against small-scale miners in Rubaya and Lomera. The organisation said that Rwanda continued to profit from this exploitation. It stated that these violations could amount to war crimes.

Following the seventh coordination meeting in Geneva, new verification missions were deployed to the field. MCVE+ teams attempted to investigate ceasefire violations on the ground in Minembwe and Masisi. However, the institutional presence of this mechanism has still failed to reduce the intensity of the fighting.

A parallel diplomatic move emerged from Kinshasa. Prime Minister Judith Suminwa said in her address to the UN General Assembly that the FDLR issue could no longer serve as a justification for Rwanda to maintain a foreign military presence in the country.

She stressed that the government's steps concerning the group were part of its commitments under the Washington process. In the same speech, Suminwa also highlighted the gap between international commitments and the reality on the ground. This position reflected diplomatically the structural deadlock confirmed by the seventh Geneva meeting.

AES States

Mali experienced one of its heaviest military losses of the past decade this week. JNIM claimed that an attack on a military camp in Dioura killed 150 soldiers, captured 93 soldiers, destroyed 15 military vehicles and more than 100 motorcycles. If confirmed, this would represent the highest death toll since last year's attack in Djibo.

During the same week, JNIM claimed that it had used mortars and SPG-9 weapons to strike four UAVs at Sévaré Air Base, including Bayraktar TB2 and Akıncı drones. It also claimed to have destroyed a drone network tower and radar.

JNIM said that at least 33 soldiers and Africa Corps personnel were killed or wounded at Sévaré and Konna Barracks. The attack represents a direct continuation of the pattern that began with last week's assault on the Dioura camp and has turned Russia's presence in the Sahel into a regular target. A frontline is now emerging in which air bases are being attacked alongside convoys.

In Burkina Faso, JNIM claimed attacks at several locations during the same week. An attack on a VDP position in Aorèma destroyed one military vehicle. Three soldiers were killed in attacks on two separate military positions in Kompienga and Malou. JNIM also claimed to have captured a military position in Pensa.

On 22 September, Goïta addressed the nation on the occasion of the 66th anniversary of Mali's independence. He said that dialogue would remain an option, while the fight against terrorism would be strengthened through the transformation of FAMa. His speech came during a week marked by an intense wave of jihadist attacks.

In Niger, the frontline and the army's chain of command were shaken at the same time. In the Tillabéri region, several soldiers were killed in a new terrorist attack in the Fartal area, 22 kilometres east of Abala. The Defence Ministry announced that dozens of "mercenaries" had been neutralised.

A few days earlier, Tiani had dismissed Chief of General Staff Barmou in response to discontent among young officers linked to the Base 101 coup attempt. He appointed Mamane Sani Kiaou in his place. The change was a concrete step in the junta's effort to reassert control over the army after the coup attempt. It also showed that tensions within the military remain as Moscow-Algeria dependence becomes institutionalised.

A regional vulnerability also emerged. Ghana announced that it had reduced fuel shipments to Mali and Burkina Faso on the grounds of protecting its domestic market. The decision once again showed how dependent the AES's political and military autonomy remains on logistical corridors controlled by its coastal neighbours.

Nigeria

Boko Haram/ISWAP attacks in Borno and Yobe continued throughout the week. ISWAP attacked a forward operating base in Mairari but was repelled with air support. Four militants were killed. In a separate attack on a militia position in the "Sate Bila" area, five people were killed. The army also announced that it had captured four Boko Haram militants in an ambush conducted jointly with the CJTF in Gujba.

In Wumbi village, near the Cameroonian border, a guard commander and four civilians were killed in an attack targeting civilians attempting to resettle in the area. Major General Abdulsalam Abubakar, the outgoing commander of Operation Hadin Kai, said that 1,106 Boko Haram/ISWAP militants had been neutralised during his 17-month tenure. The figure reflects the security apparatus's continued claims of tactical success, but the frequency of attacks does not confirm this claim on the ground.

In Sokoto, the army repelled Lakurawa militants during an operation on 20 September and rescued 23 hostages. One civilian was also injured during the rescue operation.

In Plateau, the risk of tensions between herders and farmers turning into armed conflict remains. The increasing role of local militias and criminal networks in the violence is increasingly being mentioned alongside claims of involvement by external actors.

During the femicide crisis in South Africa, covered in the South Africa section, the Nigerian Consulate General in Johannesburg issued a security warning to Nigerian citizens living in the area. This shows that the migrant security dimension between the two countries also remains tense.

Somalia

The funding crisis surrounding AUSSOM became clearer this week with a new timeline. The United States informed the UN that it would allow a 12-month withdrawal process before ending its peacekeeping support in Somalia.

The decision prevents an abrupt cut-off following the end of the mandate in December, but it does not remove concerns over a potential security vacuum on the ground. During the same week, NISA announced that it had killed Omar Siyad Caraaye, a senior Al-Shabaab commander responsible for tribal relations, along with three militants in an operation coordinated with international partners. AFRICOM also announced that it had struck an Al-Shabaab weapons depot in Puntland's Sanaag region.

Tensions between Mogadishu and Puntland escalated through a new concrete incident. Puntland security forces detained around 130 federal soldiers who entered Galkayo through Galmudug. The reason why these soldiers used this route was not officially explained. The incident shows how fragmented Somalia's internal security architecture remains at a time when piracy has reached its highest level in the past decade and AUSSOM has signalled a withdrawal.

Somalia's external military partnerships also diversified this week. Defence Minister Ahmed Moallim Fiqi received a military delegation visiting Somalia accompanied by Egypt's ambassador to Somalia. Prime Minister Hamza Abdi Barre, meanwhile, discussed the reconstruction of the Somali Air Force with a Pakistani Air Force delegation.

This multidirectional military diplomacy indicates that Mogadishu is accelerating its search for alternative security guarantees in response to AUSSOM's withdrawal timeline.

Libya

The parliamentary crisis in eastern Libya reached a new stage. Eighty-six members of the House of Representatives announced that they had reached the required quorum to remove Aguila Saleh and amend the internal regulations, but forces loyal to Khalifa Haftar prevented them from entering the parliament building in Benghazi.

This obstruction shows that the power struggle in the eastern camp has moved beyond the level of purely political manoeuvring. During the same week, the Libyan Universities Union announced that it would begin a peaceful strike from Thursday, demanding salaries and employment rights. The decision was another sign that internal institutional deterioration continues despite the diplomatic profile of the 4+4 process.

Russia's military presence in Libya became more visible this week. The Libya Review news outlet reported that Moscow was expanding the presence of the Africa Corps and restructuring its military network between the Mediterranean and Africa. Some analyses linked this activity to an intention to turn Tobruk into a maritime connection point that would provide Russia with a direct link to the Mediterranean.

The Tripoli government, meanwhile, requested technical support from the International Criminal Court through Menfi's office to investigate attacks against critical infrastructure in Zawiya and Tripoli. The request shows that the repeated infrastructure attacks of recent weeks are now being brought onto the international legal track.

On the oil front, Libya remained Africa's largest exporter of seaborne crude during the first six months of the Iran war, reaching an average of 1.20 million barrels per day. However, a partial decline in production was recorded at the Sharara field, with no reason given.

This uncertainty should be considered alongside the force majeure risk created by successive drone attacks targeting Zawiya.

Ethiopia

Tensions in Tigray crossed a new threshold this week. Armed groups linked to the TPLF confirmed that they were engaged in a “full-scale war” with the federal government. Separatist forces were reported to have captured several towns and airports, while heavy artillery fire continued in neighbouring areas. The EU responded by issuing an urgent call for “de-escalation”.

The risk of a renewed conflict has therefore turned into an official international warning after a war that killed more than 600,000 people between 2020 and 2022 according to African Union estimates. The escalation shows that the de facto breakdown of the Pretoria Agreement noted in previous weeks is now taking place on the ground rather than remaining a political claim.

In Oromia, the OLA stated that the alliance formed among opposition armed groups was only a “procedural agreement” and could not be considered a binding agreement on the political future. The statement shows that non-jihadist armed opposition groups also remain fragmented internally.

Mozambique

Conflict-related incidents in Cabo Delgado increased by 10 percent during the first half of 2026 according to a report by the UN Office for the Coordination of Humanitarian Affairs (OCHA). The report is titled “Mozambique: The Cost of Inaction” and documents the growing use of kidnappings for ransom and forced recruitment.

Zitamar’s analysis shows that the country is effectively experiencing two separate kidnapping crises. Criminal groups in urban areas target wealthy business families, while conflict-related kidnappings in the north affect fishermen, motorcycle taxi drivers, farmers and children. The latter group receives less visibility despite the conflict approaching its ninth year.

External security support advanced on several fronts this week. During its visit to Maputo, the EU decided to deepen security and defence cooperation focused on counterterrorism efforts in Cabo Delgado. France reiterated a similar commitment during talks in Paris.

The United States also announced that it would provide $1.5 million together with HALO Trust to strengthen Mozambique’s management of weapons and ammunition. This three-way support indicates that Mozambique is experiencing an increase in international attention at a time when AUSSOM has signalled a withdrawal from Somalia.

South Africa

The femicide crisis in Johannesburg turned into a national source of public anger. The bodies of nine women were found in succession around Kempton Park and Olifantsfontein. Most of the victims were identified as having been sexually assaulted and violently beaten.

While police investigated whether the cases were connected, a reward was offered. The cases emerged against a background in which the country already has one of the world's highest rates of gender-based violence. The situation corresponds with official statistics showing an average of 15 women being killed each day.

The United States announced new visa restrictions on certain foreign nationals in South Africa during the same week. Secretary of State Rubio linked the measure to the claim that the government was discriminating against the white Afrikaner minority.

President Ramaphosa, meanwhile, withdrew from public engagements after returning from the BRICS summit due to health issues. This raised concerns over domestic political uncertainty and the risk of a leadership gap amid strained relations with Washington.

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Cameroon, Chad / Malawi

DIPLOMACY

SAHEL DIPLOMACY

The AES found a selective channel for engagement with the West this week. The foreign ministers of Mali, Niger and Burkina Faso met with their counterparts from Germany, Italy and Switzerland in New York on 22 September on the sidelines of the UN General Assembly. The talks focused on political dialogue, counterterrorism and opportunities for cooperation.

The meetings were described by the parties as “direct, sincere and frank”. The contact shows that the AES continues to maintain a selective channel with Western capitals while institutionally moving closer to Russia and Algeria.

Algeria’s energy diplomacy is progressing despite the security crisis in the Sahel. In Niger, Tiani received Algerian Minister of Hydrocarbons Mohamed Arkab on 22 September. The talks covered the Kafra oil exploration project, new oil blocks and the Trans-Saharan Gas Pipeline. Arkab was also received by Niger’s Minister of Petroleum, Hamadou Tini.

During the same week, Niger signed a new agreement with Atomic Eagle, the successor to the former Goviex project, to restart the Madaouela uranium project. The United States approved up to $414 million in financing for Global Atomic’s Dasa project.

The investment was described as a “turning point” coming two years after Washington withdrew its troops from Niger. Contacts also continued along the Niger-Sudan line. Tiani received Sudan’s ambassador and followed up on his phone call with Burhan.

New information emerged regarding the permanence of the Algeria-UAE rupture. A report published by Anthropic documented with “high confidence” a broad influence operation conducted by UAE-linked officials to shape the narrative surrounding the Sudan war and neutralise critical voices at the UN. The report supported the accusations that Tebboune has repeatedly made against Abu Dhabi.

At the same time, Algeria condemned drone attacks targeting the East-West oil pipeline in Saudi Arabia and reiterated its solidarity with Riyadh. This position shows that Algeria is expanding its front against the UAE while also taking advantage of divisions within the Gulf. Washington’s interest in Algeria also continues.

Trump adviser Massad Boulos visited Algeria for the third time in fourteen months. The official agenda focused on energy talks with Sonatrach, but the Algerian Foreign Ministry confirmed that the Western Sahara issue was also discussed.

With six weeks remaining before the renewal of the MINURSO mandate, Washington’s continued engagement shows that it still considers Algeria an indispensable counterpart despite the growing military depth of the Morocco-Israel relationship.

LIBYA

Libya's 4+4 process faced a double test this week. It was reported that the outcomes of the Small Committee could be referred to the UN Security Council, with a session expected in early October. The US-backed move aims to strengthen the international legitimacy of the process.

During the same week, Turkish National Intelligence Organization Director İbrahim Kalın met with Abdulsalam Zubi, acting defence minister of the Tripoli government, in Istanbul. The contact shows that Ankara continues its efforts to bring the 4+4 process under its own patronage. Libya's Chief of General Staff also attended the China-Africa Peace and Security Forum in Beijing during the same week, diversifying its military diplomacy.

Tripoli's bid for a non-permanent seat on the UN Security Council also emerged as a foreign policy priority. From New York, Dbeibeh announced the official campaign for the 2028-2029 term under the slogan "Arbitrating Justice for Peace and Security". The bid reflects Libya's search for greater visibility on the international stage despite its internal divisions.

During the same week, bilateral contacts with Greece and Egypt continued in succession. Acting Foreign Minister Baur met with his Egyptian and Algerian counterparts in New York. This intensive diplomatic traffic shows that the Ankara-Tripoli track is advancing at the same time as the Egypt-Greece-Cyprus front that criticised Türkiye at last week's El-Alamein summit.

Migration diplomacy also remained on the agenda. The International Organization for Migration reported that the number of migrants reaching Europe by sea has declined since the beginning of 2026. At the same time, the number of migrants intercepted and returned off the Libyan coast exceeded 17,000 between January and September.

The migration wave created by the Sudan war accounts for a large part of these figures. Inter-parliamentary contacts with Greece also progressed in this context. Migration, investment, energy and frozen Libyan assets were the main topics of discussion.

MOROCCO

Morocco's 23 September legislative elections were won by the Authenticity and Modernity Party (PAM) with 97 seats. One day before the election, it was announced that the National Rally of Independents led by Aziz Akhannouch, the Istiqlal Party and PAM had reached a coalition agreement.

The election took place shortly after major protests by young people demanding jobs, higher wages and action on inequality, as well as preparations for the 2030 World Cup. The timing shows that the government pursued a strategy of absorbing social demands during the election period.

The Morocco-Israel relationship reached a new institutional stage during the same week. The two countries confirmed in New York their decision to upgrade their liaison offices to embassies. The military dimension of six years of normalisation has therefore strengthened, while the main objective regarding the Western Sahara issue has still not been fully achieved.

Washington continues to regard Algeria as an indispensable counterpart ahead of the MINURSO mandate renewal, as noted in the Sahel diplomacy section. In Madrid, meanwhile, a bill granting Spanish citizenship to part of the Sahrawi population passed Congress with 168 votes. This development shows that the accountability debate created by the Ceuta crisis has moved into a new legislative arena.

EGYPT

CIA Director John Ratcliffe met with President Sisi in Cairo on 20 September. The talks covered Iran, the wars in Gaza and Sudan, attacks targeting Gulf countries and maritime security threats.

Sisi continued mediation efforts between the United States and Iran and called for a reduction in regional tensions. The contact shows Egypt's effort to strengthen its role as a mediator with Washington alongside its attempt to establish a regional front through the El-Alamein summit.

Defence cooperation with Somalia also deepened. The commander of the Somali Air Force met with his Egyptian counterpart in Cairo to discuss training and capacity building. Egypt's ambassador to Somalia also accompanied a military delegation during a separate meeting.

DRC, RWANDA / ERITREA

The UN General Assembly platform clarified Kinshasa's diplomatic position this week. Prime Minister Suminwa stressed that commitments concerning the east must be tested through implementation rather than at the level of texts.

"We do not need new texts. We expect the existing ones to be implemented," she said, directly referring to the structural deadlock in the monitoring process of the Washington Agreement, as noted in the Conflict and War section. The position points to Kinshasa's strategy of increasing international public pressure after the inconclusive seventh Geneva meeting last week.

The US Treasury Department announced that it had lifted sanctions imposed on the Eritrean Defence Forces and certain other Eritrean institutions. The move came alongside Asmara's positioning in the Tigray crisis and indicates that Eritrea's position in Washington's assessment of regional balances is being reconsidered. It also created grounds for interpretations that Eritrea's position accusing Ethiopia of providing shelter to the RSF was being rewarded.

SOMALI DIPLOMACY

Mogadishu's external security partnerships diversified significantly this week. Defence Minister Fiqi met with his Chinese counterpart, Admiral Dong Jun, in Beijing to discuss deepening defence and security cooperation. The meeting emphasised the long-term foundation of relations between the two countries.

Somaliland President Cirro, meanwhile, met with Senator Ted Cruz in Washington, taking the recognition campaign to Capitol Hill. The meeting shows that the Abraham Accords opening has now reached the level of institutional congressional lobbying.

Somali President Hassan Sheikh Mohamud held bilateral meetings with the leaders of Serbia, Senegal, Zimbabwe and Pakistan on the sidelines of the UN General Assembly. This intensive diplomatic traffic forms part of Somalia's effort to broaden international support in response to the AUSSOM withdrawal process.

MINTEL WORLD

ENERGY

ANGOLA

Angola's offshore oil sector received a series of major capital commitments this week. TotalEnergies announced plans for $10 billion in new investment through 2031. Eni announced that it would allocate $2.3 billion to offshore exploration in 2027. Shell aims to begin drilling in Blocks 19, 34 and 35 by the end of 2027.

Etu Energias acquired Chevron's interests in Blocks 14 and 14K for $260 million, becoming the majority shareholder and potential operator of one of Angola's longest-producing offshore fields. A $350 million agreement providing flows to the Agogo production hub from four different fields was also completed.

This concentration is not accidental. It directly follows last week's announcement of a $70 billion upstream strategy and Qatar's first entry into Angola through Blocks 8 and 22. During the same week, USTDA signed an agreement to provide reliable electricity to the Lobito Corridor, while Oman is expanding its renewable energy presence in Angola and Botswana.

The simultaneous expansion of oil capital and corridor infrastructure is turning Angola into a hub where Western majors, Gulf capital and China's copper-cobalt corridor intersect.

The fuel and electricity crisis that deepened in Libya throughout the summer continued this week. Rising generator costs, difficulties in securing diesel, declining gas production and continued fuel smuggling are affecting even water supplies.

As the real value of state salaries falls against the dollar, nominal increases are failing to protect purchasing power. NOC Chairman Masoud Suleiman confirmed a partial decline in production at the Sharara field but provided no details.

The closure of the pipeline from Sharara to the Zawiya refinery resulted in a loss of 130,000 barrels per day in production. Despite this, Libya remained Africa's largest exporter of crude oil by sea during the first six months of the Iran war, with an average of 1.20 million barrels per day. Indian Oil continued to purchase Libyan crude at a premium of $23 above Brent.

The Defence Ministry of the Government of National Unity announced that an investigation was continuing into a sabotage cell targeting oil and electricity facilities in Zawiya. Presidential Council Chairman Menfi also requested technical support from the International Criminal Court.

As the gap between oil revenues and domestic consumption narrows, the NOC plans to prioritise domestic demand over exports and increase gas production in the future. This creates a structural tension with the commitments made to Europe regarding gas supplies, including the pledge made in Stavanger last week.

LIBYA


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MOZAMBIQUE

Contract tenders accelerated as the Rovuma LNG project approached a final investment decision. During the same week, the government launched a cost review of the major gas projects operated by TotalEnergies, Eni and ExxonMobil. The move indicates that projects previously suspended for years due to the security crisis in Cabo Delgado are now intended to be accelerated under state oversight.

HCB, or Cahora Bassa, is mapping the hydroelectric concession structure ahead of a $1.4 billion upgrade. It was reported that rainfall during the first half of the year increased hydroelectric generation following two years of drought.

An IMF delegation conducted a visit that could pave the way for a new financial support programme, but it is requiring additional reforms. LNG production in Cabo Delgado is expected to increase growth to 9.5 percent in 2029 and raise GDP to $31.3 billion.

This places energy revenues at the centre of Maputo's strategy to offset its fiscal vulnerability, including de Sousa's resignation that was reversed within 24 hours and the Mondlane case, as noted in the Conflict and Diplomacy sections.

UGANDA AND TANZANIA

The East African Crude Oil Pipeline, EACOP, reached a completion rate of 92.7 percent. First exports are targeted for February 2027. Museveni laid the foundation stone for the Kampala Storage Terminal but reiterated his opposition to transporting petroleum products across Lake Victoria.

He warned that an accident involving a fuel vessel could contaminate the region's most important freshwater resource. In Tanzania, a $42 billion LNG project entered the final stage of legal negotiations. Most of the commercial, financial and revenue-sharing discussions have been completed.

These two developments show that competition over pipelines and refining between East Africa's coastal states, Tanzania and Kenya, and landlocked Uganda is approaching a concrete threshold this week. The competition includes the Lamu-Tanga route, as recorded in previous weeks.

NIGERIA

Financial statements released as part of the Dangote Petroleum Refinery's planned public offering showed a net profit of $1.82 billion and revenue of more than $13 billion in the first half of 2026. This represents a sharp turnaround from the $476 million loss recorded for the whole of 2025.

The refinery sourced 116 million barrels of crude from domestic sources over the past 12 months. During the same week, Nigeria won a nine-year arbitration case after the ICC tribunal in Paris rejected Sunrise Power's $3.38 billion claim concerning the Mambilla Hydroelectric Project.

The LPG supply crisis triggered by the Iran war had its strongest impact in sub-Saharan Africa in Nigeria. Import restrictions and low domestic production caused demand to decline by approximately 23 percent. NLNG aims to commission the $10 billion Train 7 project on Bonny Island by the end of 2027.

This picture shows that Nigeria's rapid expansion in refining capacity remains intertwined with vulnerabilities in crude oil supply, foreign exchange earnings and key consumer products such as LPG.

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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.

ALGERIA

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.

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 İ0.35 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.

SENEGAL AND THE GAMBIA

Eni signed an agreement to evaluate five offshore blocks as part of Dakar's efforts to revive oil exploration. Energy Minister El Hadji Abdourahmane Diouf announced plans to increase the use of domestic natural gas in order to reduce electricity generation costs and dependence on expensive imported fuel.

Senegal also tightened local content rules for new investors. The move came during the same week as efforts to increase the state's revenue share and the involvement of UAE-linked creditors in debt restructuring as IMF approval approaches.

Senegal's energy strategy is therefore closely linked to fiscal vulnerability. Gas production has simultaneously become a priority for energy security and debt sustainability.

In The Gambia, the long-running electricity and water crisis turned into street protests this week. Police used tear gas against demonstrators near President Adama Barrow's official residence, and the government apologised to the public.

The police chief announced that unauthorised demonstrations would no longer be permitted. Through its outgoing ambassador, the Turkish Embassy in The Gambia stated that the door remained open for the return of Turkish energy company Karpowership. This indicates that the solution to the electricity crisis could return to the floating power plant model.

NIGER AND ALGERIA

Algerian Minister of State for Hydrocarbons Mohamed Arkab visited Niamey to discuss the Kafra oil exploration project, the development of new oil blocks and the Trans-Saharan Gas Pipeline, TSGP. He was received by Niger's Minister of Petroleum, Hamadou Tini.

The visit complements the energy dimension of Algeria's decision to sever diplomatic relations with the UAE on 10 September and its deepening role as a "security architect of the Sahel" toward Bamako.

A new four-well drilling campaign at the Kafra project began on 13 August. The TSGP is a long-running project intended to connect Algeria to Europe through Nigeria, but it has made limited progress due to political instability.

The simultaneous advancement of Algeria's military support and energy diplomacy toward Niger shows that Algeria is building its influence within the AES bloc along both security and energy lines.

RED SEA ENERGY CORRIDOR

Saudi Arabia is turning toward Egypt's oil transit infrastructure due to constraints along the Hormuz and Bab el-Mandeb routes.

During the same week, the United States announced that it had lifted sanctions on Eritrea's ruling party, military and major economic institutions. The decision was directly linked to the growing strategic importance of the Red Sea amid the Iran war and the Houthi advance.

The EU also doubled its naval support in Djibouti due to continuing security risks in the Red Sea.

These three moves confirm that the Red Sea-Persian Gulf-Indian Ocean corridor is increasingly being treated as a single geopolitical system rather than separate theatres. Every node from Mogadishu to Berbera affects maritime insurance calculations in London and port calculations in Abu Dhabi.

MINING

SUDAN

The death toll from the collapse at the Al-Zara gold mine in West Kordofan rose to 83. Search and rescue efforts have been hampered by a lack of specialised equipment. During the same week, 10 people were killed and 21 injured when five artisanal mining shafts collapsed in Red Sea State. Missing people were searched for under the rubble.

Mining companies in Sudan announced that they would halt gold production from the beginning of October unless the Central Bank changes its pricing and purchasing rules. The threat shows how vulnerable the state's dependence on gold has become within the war economy.

A growing dispute between army commander Burhan and Finance Minister Gibril Ibrahim over economic management, government positions and especially control of profitable mining resources has made divisions within the Port Sudan-based authorities increasingly visible.

Meanwhile, trading centres in Dubai were reported to be weakening the effectiveness of new sanctions on Sudanese gold. This finding points to the same structural pattern as last week's Zambia-UAE gold dispute, with informal flows being legitimised through Gulf-based trading centres.

SOMALIA

Somalia's Upper House of the Federal Parliament approved the Mining Law by a large majority, with 28 votes in favour and two against. During the same week, the Ministry of Petroleum and Mineral Resources submitted the mining cooperation and development agreement to the House of the People for constitutional approval.

President Hassan Sheikh Mohamud announced at the opening of the Somalia Development Finance Forum that uranium, lithium and cobalt deposits had been confirmed in the country. This three-part development shows that the same logic behind Somaliland's earlier offer to the United States of access to mineral resources in exchange for recognition, as noted in the Cumulative Synthesis section on the Horn of Africa, is also emerging on the Mogadishu side.

The federal government is preparing to use its critical mineral potential as both investment and diplomatic capital.

DRC

The Congolese regulatory authority ARSP asked Glencore's two subsidiaries, Kamoto Copper Company and Mutanda Mining, to terminate contracts with more than 1,500 subcontracting firms deemed non-compliant with Congolese legislation. The move is a concrete example of Kinshasa's pressure to increase local value in the mining chain.

During the same week, Congo's copper exports reached record levels, while sales to the United States and Europe doubled. The Zanaga iron ore project is progressing but still requires $2.17 billion in financing.

The DRC government has begun seeking new investment to retain a greater share of mining value in the country. It also announced a $24.8 billion budget plan for 2027. Prime Minister Judith Suminwa stressed in New York that critical minerals and the Lobito Corridor were central to the country's foreign policy agenda.

These developments add a new layer to the "selective state legitimacy" pattern of previous weeks, as noted in the Cumulative Synthesis. Value sharing in the extraction chain is becoming an issue of regulatory capacity as well as security.

Zambia's Konkola Copper Mines, KCM, signed a $498 million agreement with a Chinese company for a copper recovery plant. The investment coincides with Zambia's 2027 budget priorities around copper, maize and energy.

First Quantum is installing a new electric trolley-assisted haulage system to increase efficiency. A 1,315-megawatt energy project awaiting grid connection is also being reviewed. Zambia was also the subject of a report this week showing that copper exports from South Africa remain heavily dependent on road transport despite billions of dollars in railway investment.

This structural bottleneck shows that the operational capacity of the Lobito Corridor is lagging behind capital flows.

In Guinea, Wabtec secured a contract worth more than $700 million to maintain the rail fleet of the Simandou project. The agreement is aligned with the logistics backbone required by Rio Tinto-led SimFer's annual target of 120 million tonnes.

Guinea also began seeking US financing for the CBG alumina refinery. Following the previously signed $300 million bauxite agreement with Glencore, discussions on alumina and energy investments are deepening.

This move shows that the Simandou model is expanding from iron ore to bauxite and is progressing in line with Guinea's sovereign wealth fund objective of $4 billion between 2029 and 2035, as noted in the Cumulative Synthesis.

ZAMBIA AND GUINEA

NIGERIA AND NIGER

In Niger State, Nigeria, at least 37 people held under the supervision of the Nigeria Security and Civil Defence Corps, NSCDC, on suspicion of illegal mining died. The death toll rose to 38 in the following days. Most of the victims are believed to have died after being held in overcrowded and poorly ventilated conditions.

Security forces used tear gas against protesters in Minna, while the governor imposed a 24-hour curfew. The Interior Minister dismissed the NSCDC commander in Niger State. President Tinubu ordered a full investigation, while Amnesty International called for an independent inquiry.

The incident shows how illegal mining in Nigeria has created an uncontrolled space within the state security apparatus and how this lack of oversight can have fatal consequences.

Canada-based Global Atomic, formerly Goviex and now Atomic Eagle, announced a $35.4 million public offering plan to advance the Dasa Uranium Project in Niger. It is also seeking an additional $7.7 million in financing.

The company's drilling programme expanded the mineralised area. This activity in Niger's uranium sector forms part of efforts by non-Western and mid-sized capital to fill the gap left by French company Orano's withdrawal from the country. It also coincides with Algeria's hydrocarbon diplomacy during the same week, highlighting diversified external interest in Niger's energy and mineral resources.

GHANA AND CÔTE D'IVOIRE

The Bank of Ghana prioritised rebuilding foreign exchange reserves in response to current account and reserve pressures caused by the state gold buyer GoldBod halting gold exports since August.

Gold reserves declined to 24.4 tonnes in June 2026 from 33 tonnes a year earlier. During the same week, it was reported that the state gold agency's profit had increased fivefold due to strong gold trading.

This contradictory picture shows that the export halt has created a short-term balancing problem between profits and foreign exchange inflows.

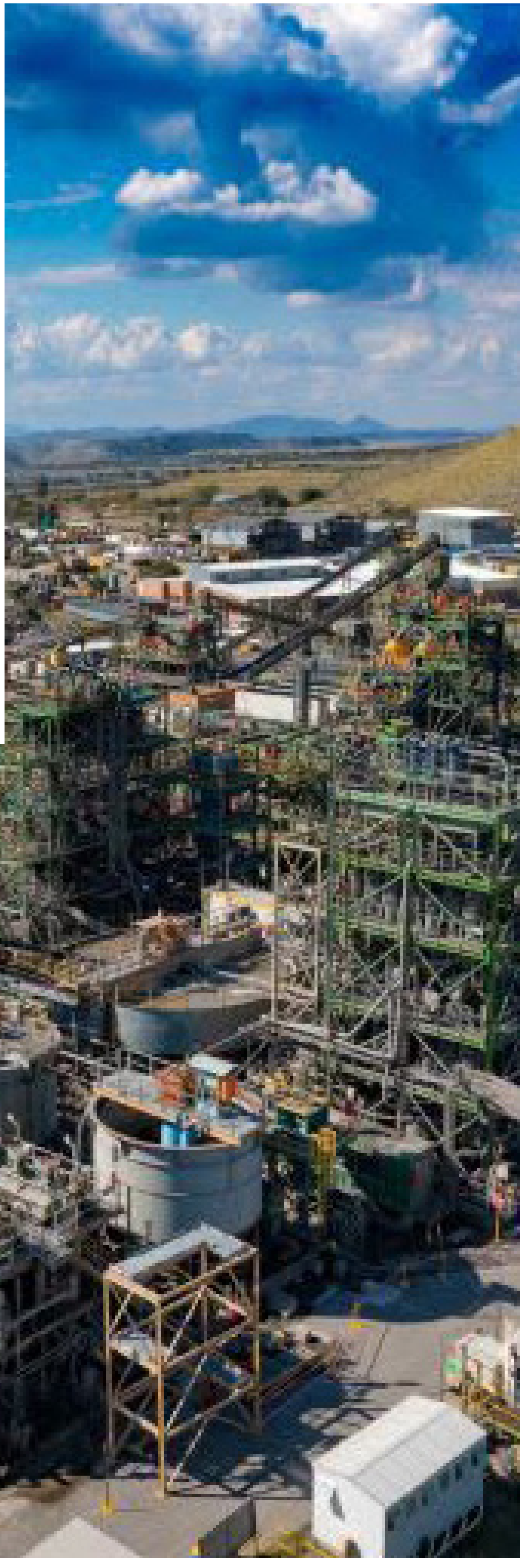
Côte d'Ivoire, meanwhile, aims to become Africa's largest gold producer by 2035. The Tongon gold mine is seeking a longer mine life nine months after a $305 million sale. The Afema resource is preparing to reveal its eighth gold deposit by the end of the year. The country's first gold refinery, operated by SIMEP, is expected to begin operations in the first half of 2027.

ZIMBABWE

South Africa's Tharisa secured $300 million to bring Zimbabwe's Karo Platinum mine into production. India entered Zimbabwe's lithium mining sector ahead of tighter processing rules.

The move coincides with the approaching January 2027 ban on lithium concentrate exports in Zimbabwe, which has been a key follow-up issue in previous weeks.

Zimbabwe is also in discussions with Afreximbank over a $115 million mining railway upgrade and secured additional funding for a key commodity transit point.




CONCLUSION

A recurring structural pattern in this week's energy and mining picture is that capital flows are moving forward without waiting for security gaps to close. TotalEnergies' $10 billion commitment in Angola, Indian Oil's continued purchase of Libyan crude at a premium amid the ongoing fuel crisis, and Sudanese mining companies using the threat of production stoppages as a bargaining tool despite mine collapses in the middle of the war all confirm the same pattern.

As state security capacity weakens, mining and energy infrastructure is not withdrawing. Instead, it is attracting more external actors. In the DRC, Kinshasa's efforts to regulate Glencore's subcontracting network and retain more mining value inside the country add a new dimension to the "selective state legitimacy" finding of previous weeks. The question is no longer only where public services are provided. Which companies operate under which rules is also becoming a defining element of state control.

Among external actors, China and Gulf capital were the most visible this week. KCM's $498 million copper plant agreement in Zambia, record-level demand for Congolese copper exports that includes China, and Canada-based Global Atomic's search for uranium financing in Niger all show that Western, Chinese and mid-sized capital are simultaneously seeking positions in the critical minerals chain.

Qatar's entry into Angola and Oman's renewable energy partnership in Angola and Botswana reinforce last week's finding. Gulf capital is no longer moving as a single bloc. Different countries are pursuing different interests. Algeria's break with the UAE during the same week and Saudi Arabia's move toward Egypt's oil transit infrastructure show that Gulf influence in Africa is increasingly developing along competing lines.

The Red Sea energy corridor was reshaped simultaneously this week by three separate actors. The United States lifted sanctions on Eritrea, the EU doubled its naval support in Djibouti, and Saudi Arabia turned toward Egypt's transit infrastructure. Considered alongside the revival of piracy off the Somali coast, as noted in the Conflict and Diplomacy sections, these developments show that the route from Bab el-Mandeb to the Strait of Hormuz is becoming a field of lasting geoeconomic restructuring rather than a single security crisis.

Zimbabwe's lithium export ban also gained new data this week with India's early entry. Foreign capital is positioning itself before the ban takes effect. The question of whether the Guinea Simandou model can be transferred to West Africa through Chinese state capital and technology also gained a concrete example through Wabtec's railway maintenance contract this week. However, the model remains specific to one country and regional expansion has not yet been demonstrated.

Finally, Sudan and Somalia provide the clearest examples of the intersection between resource wealth and security vulnerability. In Sudan, war financing runs through gold mining, while the mines themselves are collapsing and becoming hostages to the pricing dispute between the Central Bank and producers.

Somalia is pursuing the opposite approach. The state is attempting to build investment and recognition capital by announcing its critical mineral potential at an early stage. Both countries face the same structural problem, the coexistence of weak state capacity and high resource potential, but they are responding through fundamentally different strategies. This divergence creates a new open question to monitor in the coming weeks: whether Sudan's extractive economy amid institutional collapse or Somalia's early resource diplomacy will prove more sustainable.

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