

RECOMMENDATION 4 OF 20

CONTINENTAL

Act within 30 days to 1 year · by 28 October 2026 (Zimbabwe); February 2027 (African Union)

Tie mineral export rules to proof that processing plants are being built

Related briefings: [Climate and energy](#)

IN BRIEF

- African mining countries write their rules on processing minerals at home one at a time, so buyers can wait each one out or challenge it alone.
- The African Union should agree one standard in which export taxes fall as each company passes checked stages in building its plant.
- Zimbabwe should use it first, because its ban on lithium concentrate exports starts on 1 January 2027 and only one of its seven large producers is ready.

Why this matters

Several African countries already require processing at home, each in its own way. Zimbabwe banned exports of lithium ore in 2022 and will ban lithium concentrate from January 2027. Namibia banned exports of unprocessed lithium, cobalt, manganese, graphite and rare earths in June 2023. Ghana's 2023 policy says no lithium will leave the country raw. Guinea requires bauxite miners to start building an alumina refinery by 2027 or lose their permit. The Democratic Republic of the Congo (DRC) limits cobalt exports to 87,000 tonnes a year for 2026 and 2027. Separate rules like these are easier for buyers to wait out.

Zimbabwe shows the risk of a fixed ban. It exported 1.13 million tonnes of lithium concentrate in 2025, and companies have committed about \$1.45 billion to processing. Only the \$400 million plant at Arcadia, owned by the Chinese firm Huayou, is ready, and it says it has no space for other suppliers. Two other plants, at Bikita and Kamativi, are still being built. A ban on 1 January would leave smaller miners with no buyer.

Countries that act alone can also be challenged. The European Union (EU) complained about Indonesia's ban on exporting nickel ore. In 2022 a panel of the World Trade Organization (WTO) found that the ban broke trade rules. Countries that manage supply can move prices, as the DRC's limits helped lift cobalt from about \$5.50 a pound in February 2025 to \$26 in April 2026. A standard shared by many producers would be harder to divide or to challenge.

Sources for this section (9)

- [Mining.com: Zimbabwe will ban lithium concentrate exports from 2027](#)
- [Mining Weekly: Namibia bans exports of unprocessed critical minerals](#)
- [Mining.com: Ghana's policy on raw lithium](#)
- [SMM: Guinea's refinery requirement for bauxite miners](#)
- [Fastmarkets: the DRC's cobalt limits and prices](#)
- [Mining Zimbabwe: exports, money committed to processing and producers' readiness](#)
- [Finimize: the Arcadia plant has no space for other suppliers](#)
- [The Zimbabwean: plants at Bikita and Kamativi still being built](#)
- [The Diplomat: WTO panel rules against Indonesia's nickel ore ban](#)

Four levels of action

1 What Africa asks of the world

The EU, China, the United States, Japan and the United Kingdom should accept African processing milestones without taking them to court or to the WTO. They should also help pay for processing plants and the power they need.

WHO The EU, China, the United States, Japan and the United Kingdom

WHEN Mining Indaba, Cape Town, 8 to 11 February 2027, and the United Kingdom's year chairing the G20 in 2027

2 What the African Union does

The African Minerals Development Centre (AMDC), the African Union agency that helps members turn minerals into industry, writes a model standard. It sits under the Africa Green Minerals Strategy, adopted in February 2025. The standard sets export taxes that fall as plants pass agreed stages, deposits that companies lose if they miss deadlines, and checks by independent engineers.

WHO The AMDC and the African Union Commission

WHEN

Draft by 31 January 2027, for the African Union summit in February 2027

3 What regional groups do

The Southern African Development Community (SADC) agrees common stages through its 2026 to 2031 minerals project with the UN Economic Commission for Africa, which covers six producers. The Economic Community of West African States (ECOWAS) adopts the same text under its revised minerals policy, which calls for processing rules that can be enforced. Mali, Burkina Faso and Niger have left ECOWAS and are suspended from the African Union. Mali mines lithium, so the standard is written as a model law that any producer can adopt.

WHO

SADC mining ministers and the ECOWAS Commission

WHEN

SADC by June 2027; ECOWAS by December 2027

4 Which country goes first, and why

Zimbabwe goes first. It is Africa's leading lithium producer, and it faces a fixed deadline of 1 January 2027 with one working plant and two being built. The stages can be tested there within months.

WHO

Zimbabwe's Ministry of Mines and its revenue authority

WHEN

Tax schedule published by 28 October 2026

Before another country can do this

- ☒ A law that lets ministers set export terms by regulation.
- ☒ A processing plant at home or in a neighbouring country.
- ☒ Reliable electricity for processing.
- ☒ Independent engineers who can check building work.
- ☒ Export figures published for each product.

What does not carry over from the first country

- Zimbabwe exports more than a million tonnes a year, enough to fill plants that a small producer could not supply.

- Its processors are Chinese miners linked to their own refineries in China.

Who else is ready

COUNTRY	WHY	SOURCE
Namibia	It has banned exports of unprocessed lithium since 2023.	Source
Ghana	Its policy bars raw lithium exports, yet the Ewoyaa mining lease approved in March 2026 does not require a refinery.	Source
DRC	Its minerals regulator, ARECOMS, already sets limits on cobalt exports.	Source
Guinea	It requires bauxite refineries by 2027, and the African Union lifted its suspension in January 2026.	Source
Mali	It produces lithium, and in 2025 it held back export permits while it checked prices.	Source

Has this worked before?

In 2014 Indonesia set a 7.5% tax on exports of copper concentrate. The tax fell to 5% once building of a smelter passed 7.5% of the work, and to zero once it passed 30%. The mining firm Freeport put down a deposit of \$115 million. Exports carried on, but Freeport's Manyar smelter only opened in June 2024. Stages that lower a tax need firm deadlines and penalties as well. [Source](#)

Freeport-McMoRan filing to the US Securities and Exchange Commission, July 2014

First steps

- AFRICAN UNION** the AMDC and the African Union Commission send a draft model standard to member states by 31 January 2027, for the summit in February 2027.

2

REGIONAL GROUPS

SADC mining ministers, with the UN Economic Commission for Africa, agree common stages by June 2027. The ECOWAS Commission adopts the same text by December 2027.

3

ZIMBABWE

the Ministry of Mines publishes a tax schedule by 28 October 2026. Producers file building timetables and deposits by 30 November 2026. The revenue authority and an independent engineer report every three months from March 2027.

Who acts, and with what

WHO LEADS

The AMDC and the African Union Commission; Zimbabwe's Ministry of Mines as the first country to apply the standard

INSTRUMENT

An African Union model standard, adopted in national regulations; in Zimbabwe, a regulation issued by the minister

HOW PROGRESS IS CHECKED

Producer countries applying the staged terms, and Zimbabwe exporting more lithium sulphate as concentrate exports fall

SIGNAL TO CHANGE COURSE

Zimbabwe delays the ban for everyone without conditions, or countries adopt rules that conflict

WHAT STANDS IN THE WAY

Producers want a plain delay to March or June 2027. Ministries may lack engineers to check building work. Weak prices could slow building.

COST AND MONEY

Producers pay the tax. How much it raises depends on the rates and on lithium prices, and is not yet known. Companies could pay for the checks. No budget exists yet for the AMDC standard.

Who else contributes

WHO

CONTRIBUTION

Zimbabwe's Ministry of Mines and revenue authority

Run the first tax schedule

The SADC secretariat and the UN Economic Commission for Africa

Agree what each stage of building means

The ECOWAS Commission

Carry the standard to West Africa

WHO	CONTRIBUTION
The DRC's ARECOMS and Namibia's Ministry of Mines	Share what they have learned from their own rules
Mining companies	Publish timetables, put down deposits and allow checks

What each audience can do

AU and regional bodies

WHAT YOU CAN DO

Adopt the model standard

WHAT YOU GAIN

A position buyers cannot divide

Governments

WHAT YOU CAN DO

Publish building stages and export taxes

WHAT YOU GAIN

Income now and processing jobs later

Business and investors

WHAT YOU CAN DO

Commit to timetables that others can check

WHAT YOU GAIN

The same rules in every country

NGOs and civil society

WHAT YOU CAN DO

Check plants' treatment of communities and the environment

WHAT YOU GAIN

Processing that respects local people

Researchers and media

WHAT YOU CAN DO

Track exports product by product

WHAT YOU GAIN

Evidence on whether the rules work

The briefings behind this

Sector · Strong inference

Climate and energy

Money to help Africa cope with climate change is shrinking, while Africa sells its minerals and carbon credits on terms it has not yet set.

[Open the briefing](#)

Words used on this page

African Union (AU)

The organisation of 55 African states, based in Addis Ababa. Its heads of state meet each February. It can suspend members after a coup. [Glossary](#) · [Source: au.int](#)

Critical minerals and processing

Minerals such as lithium, cobalt and copper needed for batteries and clean energy. Selling ore or concentrate earns far less than processing it at home into metals or chemicals. [Climate and energy briefing](#) · [Glossary](#)

Democratic Republic of the Congo (DRC)

Africa's second-largest country by area, in central Africa. Its east has seen armed conflict for three decades, and it holds much of the world's cobalt. [Security and conflict briefing](#) · [Glossary](#)

European Union (EU)

A union of 27 European countries with shared laws, a single market and a large aid budget. [Glossary](#)

World Trade Organization (WTO)

The international body that sets and enforces the rules of trade between countries. A member can complain that another has broken the rules, and a panel of the WTO decides. [Climate and energy briefing](#) · [Glossary](#) · [Source: wto.org](#)

The G20

A group of 19 large economies plus the European Union and the African Union, whose leaders meet once a year. South Africa held the chair in 2025, and the United States holds it in 2026. [Development cooperation briefing](#) · [Glossary](#)

African Minerals Development Centre

An African Union agency, hosted by Guinea, that helps member states turn mineral wealth into industry and jobs under the Africa Mining Vision. [Climate and energy briefing](#) · [Glossary](#) · [Source: au.int](#)

African Union Commission

The African Union's secretariat. It prepares decisions for heads of state and carries them out. [Glossary](#)

SADC

The Southern African Development Community, 16 states from the Democratic Republic of the Congo to South Africa. [Glossary](#) · [Source: sadc.int](#)

ECOWAS

The Economic Community of West African States. Mali, Burkina Faso and Niger left it in January 2025. [Politics and governance briefing](#) · [Glossary](#)