

A Provider of Intelligence to the Zimbabwe Mining Community and Platform for business transaction

Min^{ing}

Z I M B A B W E

ISSUE
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2019

*Ten things the government
needs to do to improve
the Mining Industry
in 2019*

*Four reasons why
ASM declined in
Gold delivery*

Meet the most inspirational
Woman
In The Zimbabwe Mining Industry

*Pelgin introduces
a new model
truck in
Zimbabwe*

MINERS DEMAND
100% US\$ Payments

PARTNERSHIPS OF LARGE SCALE MINERS TO REVIVE
DORMANT MINES MAYBE A BETTER WAYOUT



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ABOUT PUBLICATION

Mining Zimbabwe is the premier source of Zimbabwe Mining news. Our core focus is on the ever evolving face of the mining industry, trends, new technologies being developed and used to improve this crucial sector, as well as new opportunities and investments arising from it. Mining Zimbabwe sole purpose is growing and empowering the mining industry and highlighting all its challenges as well as putting forth expert solutions.



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A Promising and Optimistic 2019



Mining Zimbabwe welcomes you all in 2019, the year which many are optimistic that a lot is going to happen in the development of the mining sector in Zimbabwe.

Mining Zimbabwe wishes all our reader a prosperous Zimbabwe and a healthy mining environment in 2019. 2019 is a promising year in the mining industry with new kid on the block Timelison Media going to hold the first ever mining excellence awards in Zimbabwe recognising excellence and honouring all those who are excelling on national growth and development through this key economic venture.

The economy of Zimbabwe is on fringes of a massive decline, thanks to the mining industry it has survived this far. The mining sector has become a great basket and major foreign currency earner for the past decade giving hope and life to the struggling giant Zimbabwe. Miners believe that if the mining sector is treated with a lot of respect and investment in the sector be supported, the country will greatly emerge a greater force in world economics. The mining industry has the capacity to reignite all the fallen industries back to full work. It has the capacity to create a rigorous and more promising economy than any sector in the country.

The industry boost of massive development in the country and have been keeping the nation intact from a possible collapse.

"No struggle can ever succeed without women participating side by side with men" Muhammad Ali Jinnah (1930). It is time for woman to man up start mining and create opportunities and ideas for the future generations. Like men, women have the capacity to change the industry and the country at large. It is high time a lot is done by a woman to fill in the gap men have been

failing to seal.

Lindiwe Mpofu is one such woman who has proved that the industry cannot move forward without woman, she has thrived in the men dominated industry and become an expectation and inspiration to both men and women. Mining industry as a business is a struggle which need men and women to work side by side for substantial development of the sector.

There is an urgent need for the government to address the short falls that the mining industry have been yearning for, miners have been lamenting for 100 percent forex which is but overdue for the government of Zimbabwe to look into.

Fidelity Printers and Refiners' monopolistic stance on gold buying should be scrapped in order to create a balanced market where both the producer of gold and the buyer benefits equality without the other having an upper hand. Monopolism always create a cocktail of hazardous outcome and unfair treatment of supposed equal parties.

For the year to be a success in the mining industry, miners need to start digging as well as engaging the powers that be for fair and sustainable deals.

Again Mining Zimbabwe wishes you a joyful and prosperous 2019 that is filled with an overwhelming development.

Mining Zimbabwe is proud to have audience in you, we would be glad if you write to us either by email or through our social media platforms. And also we would be glad if you make it your habit to visit our website every day for updates and news in the mining industry.

D. R Mapuranga

EDITOR'S NOTE





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10 THINGS THE GOVERNMENT NEEDS TO DO TO IMPROVE THE MINING INDUSTRY IN 2019

The economy of Zimbabwe has become public discourse where expects have come to the conclusion that every Zimbabwean have turned themselves into economic analysts.

By Rudairo D Mapuranga

However, for Zimbabwe to be back to full economic recovery and growth many miners are of the view that the mining industry will contribute significantly to the transformation of the frugality of the country.

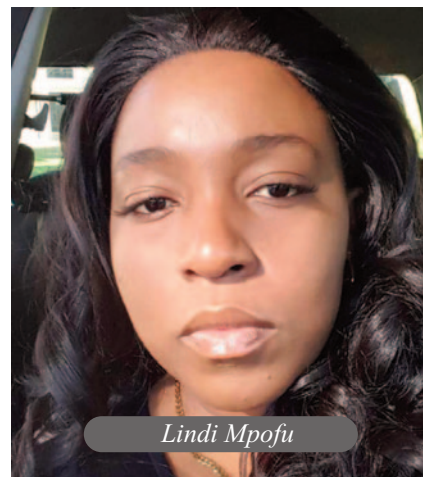
Mining Zimbabwe met two mining personnel Masango Mahlahla and Lindi Mpofu who are of the view that the government needs to take 10 steps to build Zimbabwe's mining sector and advance indigenous miner ownership from small scale production to large. The two believe that there is an

immediate need for Government to implement ten key points which Mahlahla and Mpofu pointed out in order for the industry and economy of Zimbabwe to reach unpredictable outcome.

1. The publishing of real-time market based pricing for all minerals including gemstones

Hundreds of Millions of United States Dollars in Mining Industry Revenues are lost monthly in Zimbabwe due to the unavailability of Real-Time Market Based Pricing across all minerals and gemstones. The 60 plus minerals currently identified by the government must receive up to date pricing which is aligned to the international market to facilitate indigenous investment into our diverse mineral and gemstone market. This will also enable the banking sector who also relies on pricing reports to

support the sector via loan programs as banks cannot issue loans without being able to price or value the commodity to be mined and exported. Favorable export sales contract negotiations require Published Real-Time Market Based Pricing. Small Scale miners are vulnerable to predatory buyers across all minerals especially the Semi-Precious Gemstones as pricing is not widely known.



Lindi Mpofu



2. URGENT need for a large number of international and domestic buyers for all 60 plus minerals and gemstones

There is an urgent need for Government to attract a large number of international and domestic buyers to boost competition and break up the current mineral buying cartels currently operating in Zimbabwe. Having a small number of international and domestic mineral buyers has led to the establishment of cartels who operating under different names are artificially forcing low pricing which in turn suppresses growth within a capital intensive mining sector. A Published List of Buyers along with current pricing is needed to help miners to plan their business investments and prevent predatory buying.

3. There is an urgent need to create a functional semi-precious gemstone market place

Government will greatly benefit from formalizing a semi-precious market or trade centre. Within the formalized market places: Miners will be able to display their semi-precious stones, receive valuation appraisals, while multiple buyers are onsite to competitively purchase the stones on display. Currently unfavourable transactions occur due to a lack of competitive buyers, often our semi-precious stones leave our nation to be sold outside of Zimbabwe on the informal market.

4. Urgent need for 100% allocation of foreign currency to miners on all mineral and semi-precious stone exports

Mining is heavily capital intensive with all machinery requiring foreign currency for



both the purchase of parts and production equipment. In order to promote indigenous miner growth all of the foreign currency generated by export sales is required for the re-investment into growth and maintenance of operations.

Currently small-scale mining operational growth is suppressed due to the inability to obtain foreign currency to upgrade, replace and maintain mining equipment. With the recent move to ban companies from obtaining foreign currency on the parallel market, it is now critical to grant miners full access to the export foreign currency they earn via their own operation in order to ensure their businesses remain viable. The current RBZ foreign currency allocation of foreign currency to mineral exporters is not viable and has led to the idling of mines across all minerals. Gold, Chrome and other minerals have experienced drastic reductions in production and will continue to experience further decline until this urgent matter is corrected to allow for miners to manage their own foreign currency revenue generation.

5. Need for greater involvement of the banking sector to boost efficiencies in the processing of export documents

As per the prior miner challenges



documents, RBZ noted a reduced export period to obtain CD1s in an effort to increase exports, as noted the times were supposed to be reduced to 48 hours. However at MMCZ CD1 processing takes between 10-12 days to process and some miners have been made to wait 3 weeks for their export documents. Again this delay discourages exports from small scale miners as the finance cost accrues while the product is waiting at the mine for the export documents to be processed. Note all transactions are based on a prepayment further increasing the cost of purchasing from a small-scale miner further deterring repeat purchases by the buyer. As per international standards, Zimbabwean Banks should process the CD1 directly in order to greatly reduce the processing time and enable the foreign currency generated by the exports to enter the banking system.

6. Need for domestic & international financing options



Currently MMCZ does not accept letters of credit or other internationally recognized bank financing and export trade instruments. In the case of buyers with strong banking relationships buyers

Things the government needs to do to improve the mining industry in 2019



should be allowed via RBZ to transact via their Pan African investment vehicles in order to secure long term contracts and consistent orders using the financing tools of international trade. One example would be to utilize the investment financing arrangements RBZ has with African Export Import Bank. In order to boost sector revenue growth, Government should allow our domestic banks to re-engage our sector and utilize financial instruments in order to facilitate international mineral and semi-precious stone export and trade.

7. Investment into mining production statistics

Investment must be made into statistical software or reporting to aid in the analysis of our mineral portfolios. This investment will allow Government to track mineral and semi-precious export growth and help to target minerals and semi-precious stones which need further program development and investment.

Current published statistical data is not sufficient to support Mineral and Mining Program Development and the lack of details discourages major investment into the sector by the Investment, banking and financing industries. It also places indigenous miners at a major disadvantage when seeking new mining investment as well during operational investment planning.

8. investment into weighbridge, logistical support, testing centers & centralized consolidation buying hubs

In accordance to sections 43 & 44 of the MMCZ Act, the following will provide strong support for the small scale miner's sector growth across all minerals and semi-precious stones: Price Regulations of both the foreign and domestic market (Publishing Pricing) The Establishment of Buying Hubs which would provide support and regional buying hubs within reach of buyers Encourage local Beneficiation of Chrome Ore & Base

tonne or \$240 per truck which includes reweighs. The hope was that the costs would come down to average \$0.91 per tonne or average \$30 per truck with reweighs.

9. Support the Zimbabwe Miners Federation formalization programs for ASM and Small Scale Miners



Metals (via the establishment of Micro Smelters and Smelter Tolling Arrangements) .Support Logistics and the delivery of minerals to the end customer. Another challenge noted by miners is the extremely high VID weighbridge charges: MMCZ announced in 2017 that a tender was issued to supply weighbridges near the mining towns in order reduce costs from the current average of \$7.27 per

This will greatly increase the sustainable mining production of all minerals and semi-precious stones nationwide by indigenous miners while ensuring compliance to regulation and safety requirements. Equally important, it will aid towards our Nation's 2030 target set by Zimbabwe's President to become a middle-income earning country.

Things the government needs to do to improve the mining industry in 2019



10. Partner with Zimbabwe Miners Federation & provide funding for equipment and operational management



ZMF via its affiliated associations is working to formalize and boost production of its growing membership across the nation. Government can fulfil its mandate of promoting production growth of the small-scale miner by providing operational funding to ZMF as well as by dispersing mining equipment and machinery via ZMF.

The structures within ZMF, consisting of miners provide the federation with a strong relationship base as well as an advanced understanding of the needs of the sector and

its members making the Federation an effective resource to channel investment to successfully grow the sector. In addition to the formalization drive, there is a need to fund Mineral Identification and Mining Technique and Mineral specialization Programing. This will ensure our local communities will benefit and exploit their own resources which are either currently being ignored or suffering from predatory buying due to the lack of knowledge of the value of the minerals and semi-precious stones found in the local communities. ZMF is embarking on such programs and requires government support and funding to successfully fulfil this undertaking as it works to boost provincial and national economic growth.



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Timelison Media wishes to inform its valued shareholders, stakeholders and the Mining community at large that it is going to hold the much awaited Zimbabwe Mining Excellence Awards on the 12th of February 2019, at a venue to be announced on its website, www.zimbabweminingawards.com.

The awards seek to applaud excellence in the Mining Industry, and to honour all those who are excelling on national growth and development through this key economic venture. The mining industry have proved to be a major force in reviving the economy of Zimbabwe to its former glory and status.

The awards will recognize Lifetime Achievement award, Mining personality of the year, Mine of the year, CEO of the year (only to be voted for by Mine CEOs), Inspirational female miner of the year, Mining Supplier, Small scale miner of the year among others. The awards will include honorary recognitions which also be bestowed upon key individuals at this highly anticipated red carpet event. This event will be endowed by top mining CEOs in Zimbabwe and from across the Limpopo, and will be an eye opener for those looking to leave their mark in the mining sector. Tickets will be sold online from the 2nd of February 2019.



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- Mining publisher of the year
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Miners lament for **100% USD PAYMENT**

Fidelity Printers and Refiners (FPR) where reported to have announced that they will soon be buying gold directly from miners.

Dickson Rudairo Mapuranga

According to the reports, this will assist in curbing illegal gold trade and leakages and will also foster transparency and accountability in the production and selling of gold.

However, miners went guns blazing against this move saying it is not addressing their cries but rather strengthening the position of FPR in having an upper hand in gold profits, at the same time failing to reach a related appreciative with them.

"The issue is not about middleman, the issue is about pricing and the useless bond they are giving us. Black market will still thrive until they do the right thing." Said one miner.

One expert in the mining sector said that the move which FPR is trying to implement will not be of any use to miners especially small scale and artisanal miners. Small scale and artisanal miners produce gold in small quantities yet they have a lot to do in order to become big in the mining industry. Thus, these gold miners are therefore alternatively going to the parallel market due to the fact that, the market offers 100 percent foreign currency. "Direct sales would be more ideal as the



commission structure that was previously charged by middlemen is now retained by the miner. However, the fact remains that if Fidelity was to pay 100% it would stop leakage completely as there seems to be disregard for the fact that 30% to someone mining 5-20 grams is a significant amount to lose as the input costs for extraction are expensive. The advantage to the miner is that by establishing a direct buying relationship with Fidelity the ability to access loan programmes is increased thereby increasing productivity significantly," she said. Miners are of the belief that, for FPR to improve the mining environment thereby attracting investors both locally and externally, it have to pay miners 100 percent forex.

"Regards RBZ policy on forex retention to gold miners even the 55% is not adequate enough. This policy is the reason there is no meaningful exploration for new gold deposits or even for other minerals.

Potential investors do not see profits from retaining 55% forex when the taken 45% is really about a quarter in value of the hard currency. Up until the RTGS/bond is left to free float the miners are in big trouble." Said one miner.

Many small scale miners claimed that they were selling their gold to FPR for compliancy's sake to balance books in order to secure their licences as legal gold miners.

Press Statement they released was misinterpreted. "As FPR we are not getting rid of the buyers as such, We are just reinforcing our position as the sole gold buyer."

"I'm personally delivering 10 grams to FPR so that my books will be in order, the rest to the black market. The black market have become the clean market these days" said one miner.

However when contacted by Mining Zimbabwe FPR said the Press Statement they released was misinterpreted. "As FPR we are not getting rid of the buyers as such, We are just reinforcing our position as the sole gold buyer." They said.

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MEET THE MOST INSPIRATIONAL WOMAN

IN THE ZIMBABWE MINING INDUSTRY



Lindiwe Mpofu

Over the past years women have always been on the peripheries in both sectors of the economy, even in politics and the social setup.

By Rudairo Dickson Mapuranga

Mining industry according to some experts is a very complex and crucial field to enter and it requires certain skills for one to stand ground and flourish. Mining unlike other sectors requires strength, patience and charisma for one to venture into, it is up to women to fight and become professional that they may not be pushed on the fringes of the sector. The government also needs to put in place policies that give a certain average pro-to women without emphasizing on dependence.

According to one mining expert the mining sector is already open to women, "the sector is open but women have to push opportunities for themselves, work hard and be recognized in the mining sector. The government can only help to a certain extent, much emphasis on women might bring dependency which we don't want" he said. The government has a lot to do in order to empower women in mining, women are not used to much challenges in life therefore orientation needs to start from their mental faculty, perhaps formation of mining clubs for women and holding of mining clinics is ideal in women empowerment.

Lindiwe Mpofu an inspiration to women in mining

Mining Zimbabwe believes that women need to stand up and force through their way without waiting for handouts. The same opportunities men are using, women can do likewise, and waiting for government intervention can be dramatic and chaotic thus bringing in unnecessary arguments and tensions.

Our magazine crew have found one of the most influential women in the mining industry in Zimbabwe. She is an inspiration whom other women intending to venture in the mining sector can look up to. They can as well push for the changes necessary and the growth of the sector like Lindiwe Mpofu have proved to be doing. Lindiwe was very influential and instrumental in the push towards review of the chrome sector in Zimbabwe.

Who is Lindiwe Mpofu?



She is a shareholder in a Chrome Mining Venture Alaska Mining located in Guruve. Lindiwe is also a director at the mine which produces 4000tonne per month operation. She is currently the Zimbabwe Miners Federation (ZMF) Vice President - Women's Affairs. She is also the 2nd National Chrome Representative, Member

of the MMCZ Chrome Consultative Group, Ex Vice Chair of Guruve Mining Association Board of Executives. Shareholder in Uhuru Mining with South African Partners and an Agent for Xander Resources South Africa. Lindi currently works as a Consultant with Mantle Consultancy Group and is the Co-founder of its subsidiary Company Mantle Mineral Resources an established Mining Consultancy outfit.

Role in the mining sector.

She was involved in the successful formation of an inter-ministerial agreement between three major coal mining firms in Zimbabwe. She actively participated in the proposal and negotiations of a Chrome Beneficiation Proposal Investment case under Coalbrick/ COPAZ with the Government of Zimbabwe identifying local idle capacity in chrome smelting and utilizing such capacity through an appropriate investment structure with the shareholders of such infrastructure and setting up a greenfield project with the help of a technical partner to build furnaces. (during the chrome ban). She possesses sound expertise in the areas of mine Management and project coordination, commodity sourcing and distribution services. Her commitment and work ethic have assisted in her earned reputation for reliably acquiring, marketing and moving commodities. Here we have a woman who defined all the odds in a male dominated industry and can be an inspiration to women in mining.

Where is Lindi coming from?

Experienced, multi-faceted MBA Business Consultant Professional with 18 years

working experience. Lindi has worked on several projects overseas and in Africa with leading companies across several industries most recently in the last 9 years in the mining industry. She boasts working experience in establishing mining operational processes, international trade relations, investor relations, business enhancement and performance. Expert knowledge of Chrome Ore, Coal, Gold and Tantalite. Consistent record of success in trading minerals, co-ordination of resource identification and verification, claims registration and regulatory requirements, ensuring trade compliances. She has been instrumental in the development of its diversified portfolio with some of the world's largest metal companies. Lindi has developed a strong network of metals and mining experts across developed and emerging economies. Lindi over the years has participated in project facilitation, Investment and Trade Deals - Facilitation of investment into start up mining operations, facilitation of resuscitation of Mining operations and Offtake Agreements within the mining sector. She has actively worked on turnaround programs, operational improvement and mergers and acquisitions. Her experience spans the entire production cycle, from upstream mining and raw material inputs to primary metal production, fabrication and distribution.

Lindiwe Mpofu has defined the odds in the much male dominated industry and penetrated to be an exception among the giants of the industry. The mining industry in Zimbabwe needs more women like her to reach an unpredictable turnout. The future of women in the mining industry lays mainly in hard work and perseverance than anything else.



Four reasons why ASM decline **IN GOLD DELIVERY**

Artisanal and Small Scale Miners (ASM) for the better part of the year have been the biggest producers of gold until this November when their delivery to Fidelity Printers and Refiners (FPR) declined by almost 44 percent compared to the previous month.

By Dickson Rudairo Mapuranga

This sharp decrease has resulted in ASM falling behind large Scale miners for the second time in a calendar year after doing so in July. Zimbabwe Miners Federation (ZMF) said that there are two chief explanations behind this severe reduction in gold deliveries to FPR, that is, fuel shortages and decline in the value of RTGS and Bond note against the USD. In every failing economy, many sectors are affected negatively resulting in decline in production and development, due to the prevailing economic situation in Zimbabwe, ASM have identified four reasons which led to the decline in gold delivery by ASM to FPR.

Alternative market

The Parliamentary portfolio on Mines and Mining development last month urged the government to remove FPR's monopoly as the sole gold buyer to promote competition, the monopoly was accused of creating an illegal market due to unfair prices offered by FPR to the miners. With the prevalent cash shortages and the decline of RTGS against the United States Dollar, many ASM might have been tempted to seek souk in the parallel market. Thus, the enormous amount of



gold FPR used to obtain from ASM might have found its way to the black market which offers good money than FPF.

Fuel shortages



The shortage of fuel played a major role in the decline of production, according to one artisanal miner, serious shortages of fuel from October have affected ASM gold miners who are more depended on diesel than large scale gold miners. Many ASM operate in remote areas where electricity is scarcely established. Since most of their apparatuses depend on diesel and petrol, the fuel crisis has led some ASM suspending operations.

Cash Crisis and inflation

The swift collapse of RTGS and the Bond money against the USD on the parallel market led to a fly rocketing of prices both on the informal and the formal sector, according to one expert in the mining industry, the government failed to recognize that when producing small quantities the thirty percent RTGS given to ASM is very impactful on the margins and profitability of small operations versus large small scale operations that have access to further government funding. Thus small scale miners either kept their gold or stopped delivering it to FPR for other markets.

Cash Crisis and inflation



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Four reasons why ASM decline **IN GOLD DELIVERY**

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Closure of gold mills

One expert in mining said that the government inspection operations resulted in the closure of several stamp



mills which were located strategically close to ASM, the closure of these mills has created a burden on ASM who are now forced to transport core to a distant mills for processing, fuel crisis is further

worsening the already prevailing situation, therefore productivity is affected in the in several areas due to closure of gold mills.

A large MSC container ship, the MSC TAMARA, is shown from an aerial perspective, sailing on a deep blue ocean under a clear sky. The ship's deck is densely packed with multi-colored shipping containers. The white wake of the ship is visible in the water.

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Can small-scale miners mine **DIAMOND?**

Last year the government approved the Zimbabwe National Diamond Policy to regulate and to ensure accountability in diamond mining, the policy saw only four firms being approved by the government to undertake diamond exploration and mining in Zimbabwe, any other entity wishing to mine diamond will do so after entering into a joint venture with one of the approved companies.

Dickson Rudairo Mapuranga

Some experts believe that the future of the mining industry in Africa rest in the hands of Artisanal and Small scale miners (ASM), thus encouraging an open door policy for ASM to be considered in mining diamond.

Lately Zimbabwe Consolidated Diamond Company (ZCDC) which is one of the approved firms to mine diamond in Zimbabwe was reported to have indicated that they made a decision to bring in artisanal miners into diamond extraction in order to boost production.

One expert said that ASM is a source for poverty alleviation, it is fair to note that the entire African continent has to recognize the contribution of ASM in the mining industry, where some belts are not viable for Large Scale Miners, ASM's contribution is needed, and therefore the government should consider ASM in diamond mining.

An adept in the diamond industry said that, what is important is not so much on



ASM although some affirmative action is needed to bring wealth into the hands of communities, the process of awarding the four should just be awake to the need for inclusivity. Capacity of companies is something that should be considered as diamonds play a vital role in economic resuscitation, an oligopolistic situation for now works. However, it is important to note that with proper systems to monitor them, diamond production and deposits discoveries can be up in no time using ASM.

Small scale miners believe that if they can be allowed to mine gold which is more complicated than mining diamond, therefore, the move to block them would be unjustified. However, gold is something that most ASM are familiar with, and has been mined by Africans from the inception, diamond had been known but

the issue is ascertaining value, thus, through ASM a lot of wealthy might be lost due to ignorance.

According to some miners, giving diamond mining licenses to ASM was never a wise option, the gold mining permits they have are questionable too, and they don't invest in mineral exploration and don't spend in increasing their mines. Some are holding large deposits but have no money to invest. ASM in gold mining are celebrated for producing very little, with no vision of becoming bigger and producing more.

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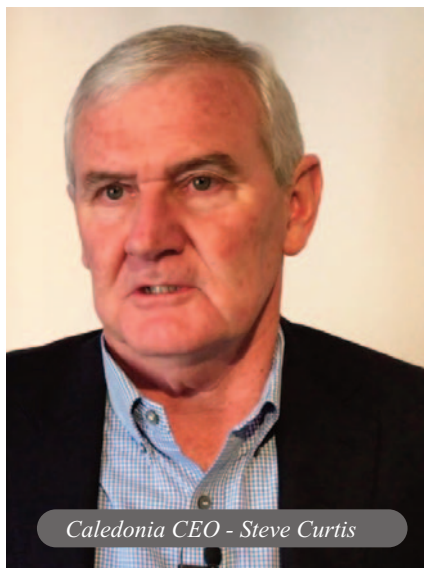


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Caledonia Mining Corporation Plc

2018 Production Update and 2019 Production Guidance



Caledonia CEO - Steve Curtis

Caledonia Mining Corporation Plc ("Caledonia" or the "Company") announces gold production from the Blanket Mine ("Blanket") in Zimbabwe for the quarter and year ended December 31, 2018. All production numbers are expressed on a 100 per cent basis and are based on mine production data and are therefore subject to adjustment following final assay at the refiners.

Approximately 14,952 ounces of gold were produced during the quarter ended December 31, 2018 (the "Quarter"), 7 per cent higher than the previous quarter ("Q3 2018"). Total gold production for the year to December 31, 2018 was approximately 54,512 ounces, which is in line with 2018 production guidance which was a range of 54,000 to 56,000 ounces. Caledonia advises investors that gold production for 2019 is expected to be between 53,000 and 56,000 ounces.

Caledonia remains on track to achieve production of approximately 80,000 ounces of gold per annum from 2021 following completion of the Central Shaft. The Central Shaft is currently at a depth

of 1,150 meters and will be sunk to a depth of 1,204 meters. It is anticipated that shaft sinking will be completed towards the middle of 2019 after which the shaft will be equipped and commissioned.

Following an increase in exploration activity at Blanket, since early 2015 Caledonia has announced 7 successive increases in the resource base as a result of which Blanket's life of mine has been extended from 6 years as at the end of 2014, to 14 years as at the end of 2018. Exploration continues at Blanket with the objective of further extending Blanket's life of mine.

Caledonia also advises that it has entered into gold price hedging contracts for the 5 months from February 2019 until June 2019 for 22,500 ounces of production through the purchase of put options with a strike price of \$1,250 per ounce. The hedge will ensure that Caledonia receive a minimum price of \$1,250 per ounce of gold for the duration of the contracts whilst maintaining full upside participation.

Caledonia expects to release its results for the year to December 31, 2018 on or about March 20, 2019.

Commenting on the announcement, Steve Curtis, Chief Executive Officer, said:

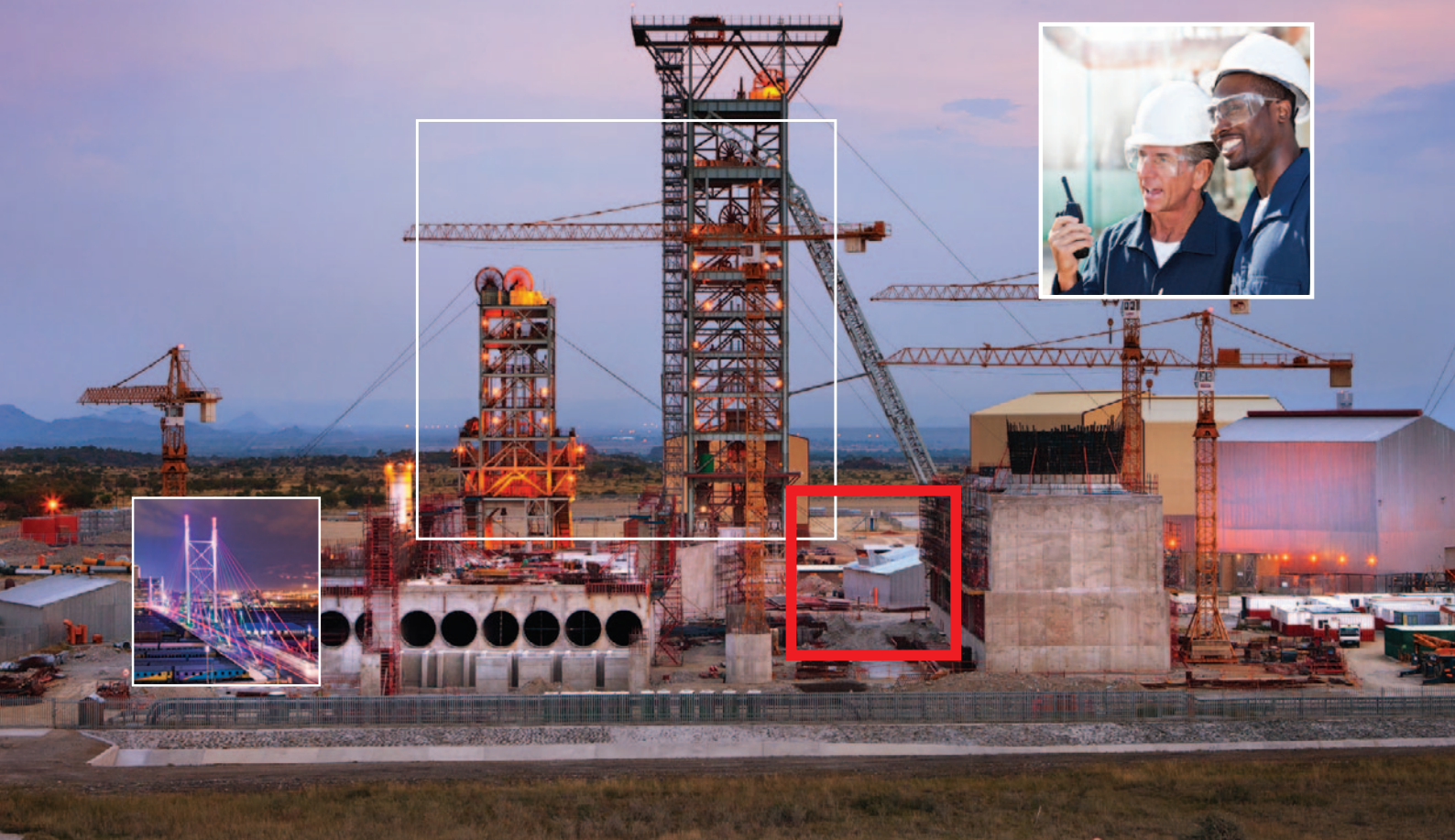
"We are pleased to see consistent production performance from Blanket in the fourth quarter of 2018 to deliver 14,952 ounces for the quarter and 54,512 ounces for the full year. Until the Central

Shaft has been commissioned in 2021, production from Blanket is expected to remain at broadly the same level as we achieved in 2017 and 2018. We therefore expect to produce between 53,000 and 56,000 ounces in 2019. Blanket finished 2018 with adequate mining and development infrastructure in place to deliver on this target and we have made a good start to 2019.

"Completion of the Central Shaft is the key to Blanket achieving its planned production of approximately 80,000 ounces of gold per annum from 2021 onwards. I expect that sinking work at Central Shaft will be completed by mid-year after which we will start to equip the shaft.

"This part of the Central Shaft project is relatively capital intensive. In light of our significant capital expenditure commitments, we believe it is prudent to take advantage of the recent strengthening of the gold price and we have therefore secured a minimum received gold price of \$1,250 per ounce for the 5 months to June 2019 whilst maintaining full upside exposure to the gold price through a cost effective option structure. The Central Shaft project is in the final 18 months of construction; we expect capital investment on this project to be lower in the second half of 2019 and to reduce further in 2020 as it nears completion. Caledonia will continue to monitor the gold price in conjunction with our projected cash position and review our hedging strategy as appropriate."

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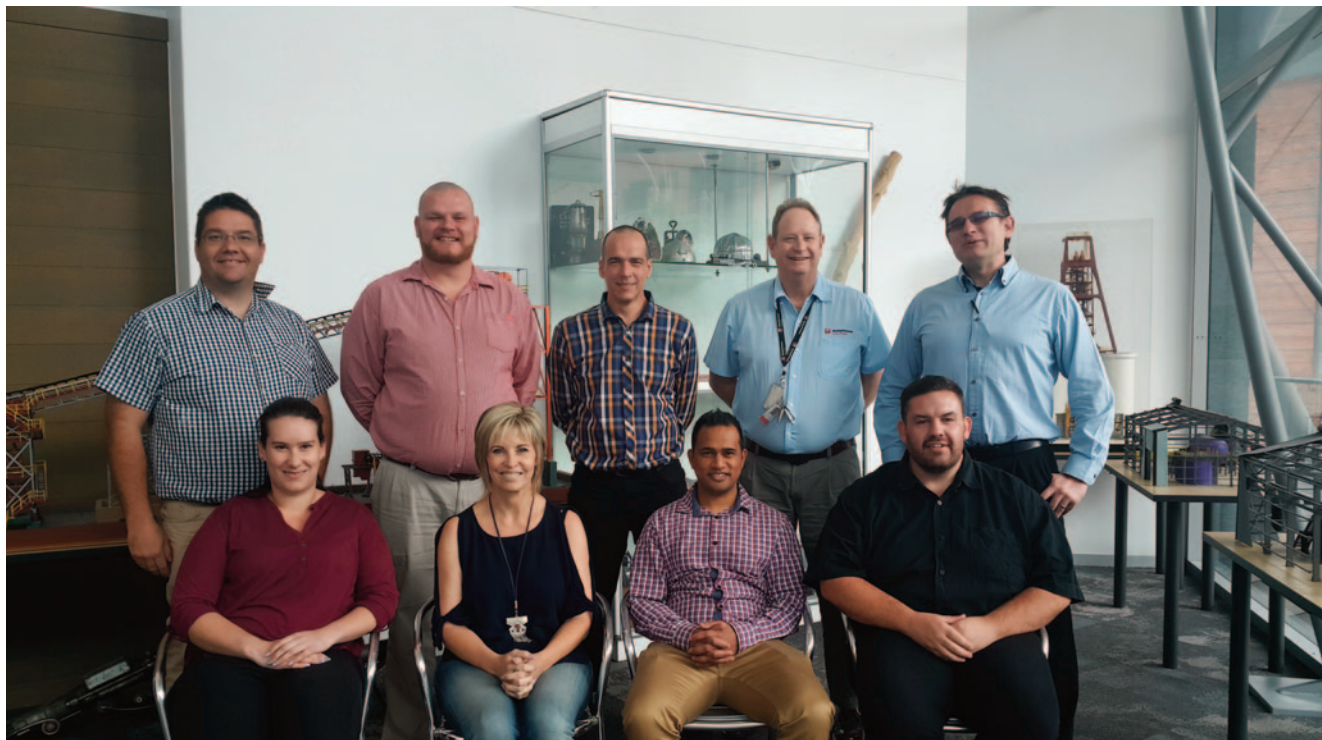
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CHANGING MINDSETS TO REALISE THE BENEFITS OF **TECHNOLOGY** IN THE MINING SECTOR



W *With the rapid development of new technology and the advent of the 'Fourth Industrial Revolution' which is disrupting traditional processes and the way we live and work, data is becoming a hot commodity.*

The challenge lies not in obtaining the data, but how to use it to its maximum potential to add real value to customers and organisations, particularly in a technologically stagnant sector such as mining.

For a company like Worley Parsons that provides engineering solutions to the world's energy and resources challenges, harnessing the power of data is vital for the organisation and its customers to prosper in the new digital age. With a long history of innovation, WorleyParsons has already been active in this space for a

number of years and has established a strong digital reputation. In South Africa, the project delivery company has positioned itself at the forefront of mining technology by developing various leading-edge data management tools, such as the Stepwise process that makes it possible to expediently create option analyses to assist customers and prospective funders in making strategic investment decisions, and integrated design project tools to create a living digital twin of a facility that can reduce risk and improve productivity on a project.

Driven by teams of technical experts across the global organisation who have the unique advantage of also having years of EPCM experience, WorleyParsons' data management solutions are aimed at addressing the ongoing challenges that



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resources & energy

CHANGING MINDSETS TO REALISE THE BENEFITS OF TECHNOLOGY IN THE MINING SECTOR



BIM Manager at WorleyParsons RSA

energy and resources customers continue to face: how to increase productivity, reduce maintenance and operation costs, and improve safety. Through collaboration and sharing of digital knowledge across WorleyParsons' multinational regions, the company's global digital teams are aligning to create the most innovative solutions to address these challenges. This digital capability is being embedded in WorleyParsons' day-to-day working, and the company is in the process of creating global service lines to make the digital capability available throughout its locations.

"The world is changing at a rapid pace. Organisations across the globe have a strategic objective to 'go digital' or be at risk of becoming obsolete, but few know how to use technology to add real value to their operations," says Denver Dreyer, CEO of WorleyParsons RSA.

"WorleyParsons has the knowledge and expertise to offer a roadmap to help our customers navigate what is unfamiliar territory for many. 'Going digital' is very different to the traditional way of doing work, particularly in the mining sector

which has seen very little change in mining methods in decades. It requires a change in mindset of the entire project team, including the customers' side, right down to mine personnel. Our customers' teams must be aligned with ours to embrace technology and understand the immense benefits of it."

Dreyer notes that it is vital to partner with a service provider that has industry experience as well as the technical expertise. Russell Du Plessis, BIM Manager for WorleyParsons RSA, concurs. "In the mining sector, we're seeing companies approach third party providers to create 3D models of projects. While this may appear impressive on the surface, the picture on the screen is not the drawback – it's the underlying data that is of value, which is accumulated by industry experts over a long period of time. What really makes virtual reality models powerful is the integrated data that makes it possible to provide

design accuracy, look pre-emptively forward, and create a scenario plan for a project. The objective is to deliver an intelligent and integrated project scope that runs from the design phase right through to construction. This can only be achieved by utilising data centric integrated design principles combined with industry knowledge," explains Du Plessis. Dreyer comments that although it will take time for the local mining sector to fully realise the benefits of digital

transformation, the company intends to mainstream digitisation across its larger projects. WorleyParsons RSA is currently collaborating with one of its international counterparts to develop a ground-breaking 'intelligent' mine for a major mining client, which is set to be one of the world's most technologically advanced mines.

"We have people who understand data management and the application of data in an operational context, and can develop digital design techniques from concept development to detailed design, implement data analytics to plant maintenance and operations to improve maintenance and plant availability, and apply digital processes and smart tools through the design, development and implementation phases. With this capability, we can develop the intelligent mine concept into a full lifecycle service offering," says Dreyer.

FACT

Organisations across the globe have a strategic objective to 'go digital' or be at risk of becoming obsolete

As part of the 'Mining 2050 Innovation Track' programme at Mining Indaba 2019 which will discuss the latest tech and innovation strategies driving the mining industry forward, Gordon Cowe, Managing Director, Major Projects Middle East at WorleyParsons, will be going into further detail about the intelligent mine concept and the positive influence of digital data management on the mining industry. **WorleyParsons' corporate presentation is scheduled for 6 February 2019 at 17h00.**



Pelgin introduces a new model truck in **ZIMBABWE**

Pelgin, are confident that this product range is set to become a major solution for mining operations looking for a productive, but price competitive solution for their haul requirements.

One of Zimbabwe's most promising equipment suppliers Pelgin Consultant services handed over a LGMG Rigid dump truck to Collin Campbell of Pomona stone quarries at a ceremony held at Pomona stone quarry in Harare in December.

The truck which is a LGMG MT60 Rigid Dump Truck, the first MT60 model to operate in Zimbabwe, offers a payload of 45 tons, and is ideally suited for medium size mines and stone quarries. However,

there are a number of smaller LGMG MT50 and larger MT86 Models already operating on chrome mines in the Country.

Pelgin, are confident that this product range is set to become a major solution for mining operations looking for a productive, but price competitive solution for their haul requirements. There are a number of medium to large projects that Pelgin are currently working on for the

Continued on next page



supply of the LGMG Range of equipment, and Zimbabwe will soon become a major destination for these products.

According to Pelgin, the truck handed to Pomona Quarries LGMG MT60 Truck, has a payload of 45 tons, and is being loaded with a Volvo EC700 Excavator, fitted with a 4.1m³ rock bucket.

"This is an ideal match, and the excavator is needing 7 passes to load the truck, which hauls the blasted grey granite in the pit to the primary crusher. The truck is standard, but does include the more robust tyres fitted with 15.00R25 E4 Tyres. This unit has a 20m³ bin purpose built to take the higher SG rated material. Standard bin size for the 45 ton payload is 25m³. The Body is made of NM400 steel and is designed to take the harsh conditions found in mining and quarrying

operations. Pelgin also provided Pomona with a LGMG Technician to offer operator training as well as maintenance training." Said one Pelgin consultant member.

Pelgin are the official Volvo CE Dealer in Zimbabwe and have become a major source of equipment for the mining and construction industries in Zimbabwe. In addition SDLG is also offers by Pelgin, a Company that is jointly owned by both Volvo CE and LGMG. This gives Pelgin the unique advantage of offering the full spread of mining and construction equipment that offers complete solutions to their customer base. There is no doubt that LGMG will become a popular Brand for Pelgin in Zimbabwe as the mining industry embraces them in the years to come.

Pelgin also offer LGMG MT86H model,



which is a 55 ton payload. It is extremely popular in larger mining operations around the world, reports have it that, over 3 000 of these units are sold each year. LGMG can offer up to a 70 ton payload model, for example their LGMG CMT106. The truck is a dedicated rigid off road mining dump truck, built from the ground up. LGMG trucks are tougher, more productive and dedicated to harsh mining conditions. This, coupled with being extremely price competitive, make it a viable alternative not only to generic tipper trucks but also the more conventional, yet pricey, articulated and rigid mining trucks available.

Partnerships of large scale miners to revive dormant mines maybe a better way out



Mergers and acquisitions (M&A) that have taken place around the world and Zimbabwe can do it too.

Mining is one of Zimbabwe's largest foreign currency earners, contributing more than 60% of the forex earnings.

It also constitutes about 15% of gross domestic product (GDP), between 8 to 12% of government revenue and more than 500 000 formal jobs, according to government reports.

But sadly, the sector is currently facing a plethora of challenges which have seen some mining companies downsizing or shutting down altogether.

For those mines to be revived there is need for collaboration between mining players themselves.

For instance, those that are currently afloat like Caledonia Mining Corporation, Zimplats, Mimosa, Africa Chrome Fields, Zimasco, Asa Resource Plc, Makomo Resources, Zimbabwe Consolidated Diamond Mining Company among others, could join forces and revive dormant mines.

That could be done through partnerships or mergers and acquisitions.

When mergers or acquisitions occur, they create some of the largest mining power-houses in the world and can have an everlasting impact on the industry.

Examples of mergers and acquisitions

The most recent of the biggest mining mergers, according to Mining Technology, is the Canada-based Barrick Gold which announced its acquisition of Randgold Resources for around \$18 billion on 24 September 2018. The merger will create the world's biggest gold mining company, with a combined production capacity of 6.6 million ounces of gold per year.

On May 2, 2013, multinational mining company Glencore completed the acquisition of Anglo-Swiss mining company Xstrata, in a deal worth around \$90 billion. The merger created one of the world's largest natural resources conglomerates, with a combined workforce of 190,000 people across 50 nations, and a portfolio of 90 commodities, including copper, barley, oil, and vanadium, according to Mining Technology.

Anglo-Australian mining giant Rio Tinto in

July 2007 acquired Alcan in a deal worth \$38.1 billion, making it the world's largest producer of aluminium and bauxite at the time.

Two of China's largest state-owned enterprises, Shenhua Group and the China Guodian Corporation, according to media reports, completed a merger on 20 November 2017, valued at almost \$273 billion.

These are some of the mergers and acquisitions (M&A) that have taken place around the world and Zimbabwe can do it too.

The mining sector is now ripe for M&A, given the amount of pressure it has been under.

Struggling mines needing revival

Some of the struggling mining companies include Metallon Gold Corporation which owns How Mine, Shamva, Mazowe and Redwing mines. Some include Sabi Gold Mine, Jena Gold Mines, Elvington Gold Mine, Shabanie Mine, Kamativi Tine Mines, Bikita Mine, Sandawana Mine, Lynx Mine, R.H.A. Tungsten Mine among

others.

Metallon Gold Corporation used to produce about 50 percent of Zimbabwe's gold output but is currently struggling.

Last year in September, the mining concern rolled out a massive retrenchment exercise at its four mines in Zimbabwe namely How Mine, Shamva, Mazowe and Redwing in a bid to arrest mounting operational costs.

The miner reportedly owes workers salary arrears running into millions of dollars, accumulated over the past few years.

Sabi Gold Mine was placed under judicial management, following the suspension of operations in 2014 and it still faces debt problems and also needs a massive cash injection to ramp up operations.

The mine is located in Zvishavane in the Midlands and it operates one rectangular double compartment shaft reaching down to 15 metres below a 12 level elevation.

There is also Jena Gold Mines located in Silobela, 60 km outside Kwekwe, central Zimbabwe. It operates a multi shaft system and has a capacity to treat 450 tons of ore per day.

Elvington Gold Mine which is about 100 km west of the capital Harare suspended operations in 2003 due to the collapse of one of its main shafts. The mine is on care and maintenance. Elvington used to produce 45kgs of gold per month before the shaft incident.

Shabanie Mine, located in Zvishavane in the Midlands province, used to be one of the biggest employers with over 2 000 workers, but was shut down closed in

2004, due to low demand of white asbestos.

Kamativi Tine Mines, a wholly owned subsidiary of Zimbabwe Mining Development Corporation, closed operations in 1994 after 58 years of operation. The closure of the mine was prompted by the fall of the price of tin, the state miner has said. In its heyday, it produced tin and other by-products including tantalite niobium and lithium minerals. Kamativi mine is having renewed interest because of the firming tin prices and the large suite of minerals associated with tin.

Bikita Mine is located in southern Zimbabwe in province, about 80 km east of Masvingo town. It is one of the largest lithium mines in Zimbabwe. It is home to reserves amounting to 10.8 million tons of lithium ore grading 1.4% lithium thus resulting in 0.15 million tons of lithium.

Sanyati Copper Mine, located in Kadoma District, owns three copper mines, namely Sanyati Mine and Alaska Copper mines, Mhangura Copper Mines and Lomagundi Mines but they were mothballed due to a slump in copper prices and an unfavourable economic and policy environment.

Sandawana Mine is located nearly 100 km south of Zvishavane town in the Mberengwa district in the southern part of Zimbabwe, suspended in 2011. The mine hosts part of the Mweza Greenstone Belt and has great potential for emeralds, gold, tantalite, beryl, iron ore, silver, niobium, lithium, chrome, tin and slate. It consists of a number of emerald deposits including Ceres, Athene, Eros, Marmaid, Junc, Zeus, Atom, Plato, and Vulcan among others.

The Karoi-based graphite mine, Lynx Mine, is under care and maintenance. Production was discontinued in September 2017, with lack of capital being cited.

R.H.A. Tungsten Mine is located 270km south of Bulawayo, Zimbabwe's second biggest city, and is owned by AIM-listed Premier African Minerals. Operations at the mine were suspended in January as the company said it was negotiating with a state empowerment company on a new funding model after the indigenisation law was relaxed by the new government.

Challenges facing mining sector

Mining is capital intensive and as a result, mining companies are struggling to raise funds for recapitalization.

According to Chamber of Mines of Zimbabwe chief executive officer Isaac Kwesu, the sector requires about \$11 billion.

Some of the challenges affecting mining sector in Zimbabwe include a fall in the global prices of minerals, unfavorable economic conditions, electricity supply, shortages of foreign currency, general rise in the cost of inputs, shortage of capital, international market movements, operational costs and steep tax rates among other problems.

Several mergers and acquisitions (M&A) have taken place around the world and Zimbabwe can do it too.

Conclusion

With A&M, the future of the mining sector in Zimbabwe is very promising. The sector can attain as much as 25% of GDP and can even treble its employment capacity in the next 15 years.

All Minerals and location found in Zimbabwe

Agate	Nyamandhlovu, Chikomba, Lupane
Aluminum	Mutare, Nyanga, Mwenezi
Amazonite	Nyamandhlovu, Rushinga
Amethyst	Nyamandhlovu, Hurungwe, Hwange, Makonde, Lupan
Antimony	Kwekwe, Bubi, Mberengwa, Kadoma, Shurugwi
Arsenic	Bubi, Shurugwi, Mutare, Gwanda
Asbestos	Masvingo, Gwanda, Matobo, Mberengwa, Insiza, Makonde, Umzingwane
Aventurine	Masvingo, Beitbridge
Barites	Kwekwe, Mwenezi
Beryl	Hurungwe, Kariba, Goromonzi, Harare, Mudzi, Rushinga, Mutoko, Bindura, Marondera, Gutu, Buhera, Bikita, Chegutu, Hwange, Mberengwa, Gweru
Bismuth	Gwanda, Insiza, Goromonzi, Hwange
Cesium	Mudzi, Bikita, Goromonzi
Calcite	Hwange, Bindura, Chiredzi, Mwenezi
Chromium	Mberengwa, Guruve, Makonde, Gweru, Kwekwe, Shurugwi, Chegutu, Kadoma, Gwanda, Insiza, Masvingo, Chirumanzu
Citrine	Marondera, Harare, Goromonzi
Clay	Harare, Bulawayo, Gwanda, Gweru
Coal	Gokwe, Chiredzi, Beitbridge, Mwenezi, Hwange, Lupane, Binga, Kariba, Hurungwe, Bikita
Cobalt	Kwekwe, Insiza, Shamva, Bubi, Bindura
Copper	Makonde, Kadoma, Mutare, Chirumanzu, Chegutu, Kwekwe, Shurugwi, Beitbridge, Gokwe, Bindura, Chipinge, Bikita, Insiza, Makonde, Harare, Bulawayo, Shamva, Chiredzi, Nkayi, Mudzi, Chegutu, Bindura, Kwekwe, Hurungwe, Bubi, Makonde, Bikita, Gwanda, Masvingo.
Cordierite	Hurungwe, Beitbridge, Chimanimani, Rushinga, Makuti
Corundum	Beitbridge, Chiredzi, Shurugwi, Marondera, Mberengwa, Mazowe, Rushinga, Insiza, Goromonzi, Wedza, Makoni
Diamond	Gweru, Bubi, Beitbridge, Binga, Mwenezi, Mutare, Chivi
Diatomite	Hurungwe
Dolomite	Mutare, Beitbridge, Makonde, Mudzi, Masvingo, Rushinga.
Emerald	Gutu, Masvingo, Insiza, Mberengwa, Hurungwe.
Feldspar	Harare, Bikita, Umzingwane, Goromonzi
Fireclay	Hwange, Chiredzi, Kwekwe, Lupane, Nkayi, Kadoma, Kwekwe
Flint clay	Mwenezi, Beitbridge
Fluorite	Hwange, Guruve, Binga
Garnet	Beitbridge, Hurungwe, Mudzi, Guruve, Rushinga, Marondera
Graphite	Hwange, Hurungwe, Kariba, Makonde
Gypsum	Beitbridge
Gold	Every district in Zimbabwe
Iron	Kwekwe, Mberengwa, Harare, Kwekwe, Buhera, Gweru, Charter, Chiredzi, Masvingo, Mazowe, Kadoma.

All Minerals and location found in Zimbabwe

Jade	Masvingo
Kaolin	Kwekwe, Mutare, Bubi, Hwange, Kadoma, Mazowe, Harare, Umzingwane, Nkayi, Chegutu
Kainite	Hurungwe, Nyanga, Mudzi, Rushinga
Lead	Mberengwa, Kwekwe, Gokwe, Mutare, Wedza, Hwange
Limestone	Mberengwa, Gwanda, Bindura, Shamva, Mazowe, Kadoma, Umzingwane, Gweru, Chegutu, Chimanimani, Mudzi, Harare, Hurungwe
Lithium	Goromonzi, Mudzi, Buhera, Bikita, Chegutu, Hwange, Harare, Insiza, Rushinga, Mutoko, Mutare, Hwange
Magnetite	Gwanda, Nyanga, Kadoma, Mwenezi, Insiza, Buhera, Mberengwa, Beitbridge, Gweru
Manganese	Kwekwe, Gweru, Makonde, Mberengwa
Mercury	Bubi, Kadoma
Mica	Hurungwe, Rushinga, Kariba, Hwange
Molybdenum	Kwekwe, Insiza, Shurugwi, Makonde, Chipinge, Gweru, Mutare
Mtorolite	Guruve, Mutare
Nickel	Bubi, Makonde, Kwekwe, Insiza, Guruve, Shamva, Shurugwi, Matobo, Chegutu, Bindura, Gweru.
Ochre	Gweru, Kwekwe
Palladium	Kwekwe, Makonde, Shurugwi, Chegutu
Phosphate	Buhera
Platinum	Kwekwe, Makonde, Shurugwi, Chegutu, Centenary
Pyrite	Shurugwi, Gwanda, Mazowe, Kadoma, Bulilimamangwe, Shamva, Hwange.
Salt	Mwenezi
Sapphire	Mudzi
Selenium	Makonde
Silica	Gweru, Kwekwe, Makonde, Chegutu, Gokwe, Harare, Goromonzi
Sillimanite	Hurungwe
Silver	Makoni, Makonde, Kwekwe
Talc	Bubi, Guruve, Insiza, Nyanga, Mutare, Mt Darwin, Mberengwa, Goromonzi, Mutoko, Wedza, Kwekwe, Makoni
Tantalum	Hurungwe, Guruve, Kariba, Mudzi, Mutoko, Shamva, Bindura, Harare, Goromonzi, Murehwa, Mt Darwin, Rushinga, Mazowe, Marondera, Gutu, Masvingo, Buhera, Bikita, Mutare, Hwange, Chivhu, Mberengwa, Chimanimani, Makoni, Insiza
Tin	Hurungwe, Mudzi, Shamva, Bindura, Goromonzi, Harare, Rushinga, Mt Darwin, Nyanga, Gutu, Bikita, Hwange, Masvingo, Mutare
Topaz	Hurungwe, Gweru, Mutare
Tungsten	Hurungwe, Kariba, Shamva, Mazowe, Rushinga, Bindura, Guruve, Mt Darwin, Harare, Mudzi, Goromonzi, Bulawayo, Insiza, Matobo, Gwanda, Umzingwane, Bubi, Buhera, Mberengwa, Kadoma, Bikita, Shurugwi, Mutare, Chipinge, Chegutu, Kwekwe, Chiredzi, Wedza, Gweru, Hwange, Masvingo, Makoni
Vanadium	Mt Darwin, Guruve, Bulawayo
Vermiculite	Buhera, Mudzi
Zinc	Kwekwe, Gokwe, Nyanga



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