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ISSUE  
**62**  
2023

*Interview:*  
*Mines and Mining*  
*Development Minister*

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Exploration and mining on the  
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**Marc Nicolle**

DALLAGLIO CHIEF EXECUTIVE OFFICER



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# Mining Investments in Zimbabwe: proof is in the pudding



*Keith Lungiso*

## THE CLEAR PERSPECTIVE

Zimbabwe has received its fair share of negative publicity. Whilst some mining companies regard it as a no-go area many have flourished in this so-called high-risk jurisdiction.

Implats CEO Nico Muller reiterated that Zimbabwe is the best jurisdiction and contrary to reports the giant has never had any issue repatriating funds from the country.

"From a group perspective, I'd have to say Zimbabwe has been our best jurisdiction in which to operate over the past 20 years. It's the jurisdiction in which, thanks to the leadership of Alex (CEO Mhembere) and his team, we have the least amount of disruptions, we have had the most predictable production profile," Muller told delegates in Johannesburg.

"We also have our safest operations, (and) the best control over costs, and our projects there are always on schedule."

Zimbabwe's fastest-growing gold miner, Caledonia Mining Corporation CEO Mark Learmonth said prospects for the NYSE-listed company in Zimbabwe are far better than anything they could find outside the

country.

Said Learmonth, "If you ask any African geologist, they will tell you that Zimbabwe is highly prospective for gold but has been underexplored for decades. We understand the potential for multimillion-ounce gold deposits in Zimbabwe, so there's a high degree of prospectivity.

"This is our home; we think the prospects for us in Zimbabwe are far better than anything we could find outside the country. We believe that we are in pole position to be able to recognise assets, acquire them and turn them into profitable operations,"

Huayou Cobalt one of the world's biggest companies in the battery metals business bought one of the world's largest hard rock lithium resources in Goromonzi, Zimbabwe. The company is expected to begin lithium exports this quarter. The list goes on and on.

Zimbabwe was nominated for the improved mining jurisdiction award by the Mines and Money London Outstanding Achievement Awards in 2022.

Despite all the negatives said about investing in mining in Zimbabwe, the proof is in the pudding. We are open for business come through!



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# Dallaglio CEO Marc Nicolle

*By Keith Sungiso*

“

*In 2022 we averaged 160kgs per month, in 2023 we aim to grow that in terms of a double-digit percentage.*

”

**I**n 2021 a company brought back to life a Mine that had shut down 20 years ago breathing life into the otherwise lacklustre town of Guruve in Mashonaland Central Province of Zimbabwe.

There was a rebirth of hope as hundreds of men and women solidified their place as breadwinners after securing employment with Dallaglio's Eureka mine. As many were preoccupied with the pleasant developments at Eureka mine little did they know Dallaglio was already a major gold player running another popular Chegutu-based asset, Pickstone Peerless Mine.

Mining Zimbabwe sat down with the man responsible for leading the company's overall operations Mr Marc Nicolle who is the company's Chief Executive Officer (CEO) to learn more about the organization's operations and its plans for the future.

This is how the intriguing exchange with the 41-year-old Mining Executive went.

**Can we have a brief background about yourself and how you ventured into mining?**

I grew up in Gwanda, the home of Caledonia's Blanket Mine. My family has been there since the late 1890s. Being a gold mining town, mining was always adjacent to everything we did and therefore a regular part of life. I really enjoyed chemistry at school thanks to some great teachers and when I wasn't sure what to study, I did some assessments and ended up studying chemical engineering. Chemical engineering then led me to a processing career in the mining industry.

**What is Dallaglio's strategy when it comes to mining growth and development in Zimbabwe, are there any plans for the company to add more Mines to its portfolio?**

There is definitely hunger from our shareholders and from the management to grow the business but we want to grow the business in a very responsible way. There is evidence across the world of mining companies that do too much too soon. We want to be very credible, and all our focus today is to build that credibility. Building the plant at Pickstone Peerless was a big investment step for our early shareholders in 2014,

*Continued on the next page>>*





Eureka gold Mine

that investment brought Pickstone back to life in 2015. With the success of Pickstone, Dallaglio acquired Eureka in 2018 which was a dormant asset and brought that back to full operations in the second half of 2021. The group continues to look for opportunities to grow but we want to do that with a strong balance sheet and with a very credible production track record.

**Pickstone Peerless Mine is currently moving from open pit mining to underground as well as adding heap leaching, how is this development going to increase production at the Mine?**

Pickstone underground will increase the grade that we can feed our mills. It is harder ore and because it's harder ore we will have to increase the milling capacity at Pickstone in 2023. That higher grade will increase our production from the current 40 - 50 kgs per month to an average of 80 kgs per month. The heap-

leach is a project that we will detail more in 2023 with the possibility of making an investment in 2024 if the numbers come back as positively as they currently look. With heap-leaching, we are targeting an additional 30 to 40 kg per month on top of the 80 kgs per month from the underground.

**Eureka Mine is currently conducting open-cast mining, are there any plans to go underground?**

There is a potential to go underground. We have over 860 thousand ounces at 3.7g/t in the underground portion of the Eureka resource, that's an orebody that we have defined to 650 metres below the surface and is open at depth beyond that. Our plan is to mine the first 300 metres from an open pit, and the balance from underground. That underground planning is on the radar to be defined in 2023 and early 2024. It will take a significant time and investment to get

underground at Eureka, and therefore our view at the moment is that it may add to the life of the Eureka mine in time.

**Eureka has arguably the best CIL plant in Africa. What inspired you to develop such a plant and has it been rewarding vs current production?**

All credit for that CIL plant needs to go to one of the founding shareholders, Mark Evans. Mark Evans is an incredible individual and we are lucky to have him as part of the team. He pulled together a design for the plant and delivered it at or above expectations. Kemix in South Africa were the supplier of a significant portion of the CIL plant design and Brown's Engineering, a local company manufactured the tanks on-site from Harare. The young local Zimbabwean mechanical and civil engineers that were hired permanently into our team did a great job under Mark Evans in putting that CIL plant together.



Pickstone Peerless mine in Chegutu







**Does Dallaglio have plans to promote small-scale Miners through knowledge exchange and giving out mining tributary arrangements?**

Dallaglio already has some mining tribute arrangements in place. They are community-based arrangements that keep the communities around our mines aligned to our objectives and importantly give them an opportunity to make a living.

**In the next few years, what are Dallaglio's plans in terms of investment specifically in Pickstone Peerless and Eureka Mine?**

At Pickstone we are very excited about the underground which is in the old Pickstone trend. Our initial phase focuses on the shallower portions of the ore body while the subsequent phase

after we are in operation targets ore down to 14 level. An investment into that deepening of the Pickstone mine is very exciting for us. In addition to Pickstone, 500 metres North we have the Peerless trend. Peerless is another ore body that we mined from the open pit at surface. From our experience of mining Peerless from the surface, it is a wider ore body, and we are doing some conceptual work to see how best to mine that from underground.

At Eureka, we have the beginnings of the underground as we spoke about earlier, so we have that portion below the open pit that is open at depth to consider for underground mining. In addition to that, we have done some test work on ore sorting. This test-work has shown good potential to increase the grade of ore fed to the mills which will allow us to mine faster and achieve quicker returns.

**As the world is going green there seems to be a global lithium rush. Are there any plans for Dallaglio to diversify and potentially get into Lithium mining?**

At this stage, we don't have plans to diversify into lithium mining. We have our hands very full at Pickstone and Eureka realising the value that we can see there. It's not to say that if the right opportunity comes along we will not consider it.

**Zimbabwe is generally relegated as a risky investment destination. As a company operating in Zimbabwe, what are your comments on the experience?**

I am a Zimbabwean and I'm very satisfied to be back in Zimbabwe applying my trade, my skills and leading a team of keen Zimbabweans as we do our bit to help make this country what it can be. That said, I also understand the international community's view of Zimbabwe as an investment destination, capital in mining is scarce and it must chase the best return. My experience in being back is that there is a willingness from the government and all stakeholders to make it work, but it must work in a way that is good for everyone. It must work for communities, it must work for the government, and it must work for the investor and I think that the Unhu / Ubuntu aspect of Zimbabwean mining is something that once the industry fully adopts, we will see an even more positive change. My experience has therefore been positive, there have been decades of under-investments in the Zimbabwean mining industry and those decades lead to many opportunities that no longer exist elsewhere in the world.

**How have you (at Eureka) managed to be one of the top gold producers in the country while mining a low-grade gold deposit?**

At Eureka, we run a relatively large-scale open pit operation and achieve over 93%

*I am a Zimbabwean and I'm very satisfied to be back in Zimbabwe applying my trade, my skills and leading a team of keen Zimbabweans*



Eureka CIL plant





*Nicolle takes Mines Minister on a Pickstone Peerless tour*



*Marc Nicolle*



*Work in progress at Eureka mine*



*Nicolle with colleagues at Pickstone*

gold recovery. Tight management and control across the geology, mining, processing and shared service areas of that operation allow us to manage costs.

#### **What is your employment policy at Dallaglio i.e. in terms of employment of the local community?**

In general, at Dallaglio, we want to be the employer of choice in the community. Our approach is to look within the local community for human resources. As I mentioned before, growing up in Gwanda, it is clear to me that the community of a town contributing to the local industry builds a symbiotic win-win relationship. That said though, we have a very high need for top skills and professionals in running an effective and efficient mining business. We, therefore, look for those skills in general and deploy them as needed across the business. I will give you a good example of how this practically works out for us, our group Processing Manager Obert Chiyangwa and our Group Treasurer Maduviko Mubaiwa are both from Guruve, the town closest to Eureka. However, in their group roles, neither is based in Guruve full-time. At Pickstone we have several key members of the team looking to buy houses in Chegutu to have their families close by, part of the community and their work.

**There is a presence of GRANODIORITE rock which is well known for being extremely hard and tough. How are you handling this rock and managing costs**

#### **at Eureka?**

Yes, the abrasive aspects of this host rock are a factor in our handling of it at Eureka. Firstly, we focus on achieving the best fragmentation we can in the blasting carried out in the pit. This is the most cost-effective place to achieve size reduction. So, our first port of call is to blast it correctly in the pit, after that we move our focus to crushing. Achieving effective crushing is done by constant monitoring and management of the key wear components of the circuit to keep the circuit effectiveness at the desired high levels.

#### **Are you doing in-house mining or contract mining? If it's contract mining, how are you managing the contractor?**

We are doing contract mining. Our General Managers on both sites are mining engineers and both have solid experience in open-pit mining. Through the General Manager's structure, we have a mining technical service team that does our mine planning. We then have a Mining Manager who oversees the contractor implementation of our mine planning. So, one team defines the recipe and the other cooks the cake and through that, we manage our contractors using a "planned vs actual" review.

**What is the confidence level in the Eureka Mine Resource Model? What measures are in place to ensure that there are no surprises in the Life of Mine Plan as a result of flaws in the resource**

#### **model?**

The confidence level in the Eureka Mine resource model is to JORC standards and therefore high, it's the highest in our group. We have taken data that has been generated to date, reassessed it and created a validated and detailed geological structural model. From that definition of the structural model, we have applied the grade data and more confidently interpolated it. The performance of our resource model to actual production at Eureka through 2022 has been a highlight of the year for me.

#### **What would you want to see change in Zimbabwe Mining?**

Zimbabwe is sitting on assets that can be world-class and the platinum industry here has proven this over many years. When a business can deploy capital and confidently get a good return on it, our industry will continue to grow.

#### **Besides the Mining business, what's Marc Nicolle into?**

My family, I'm married to Sofia and we parent four great children together. I enjoy cricket and rugby very much and I enjoy hiking and business in general. I enjoy seeing people grow and overcome challenges. I really enjoy interesting conversations with diverse people, it's always nice to test my assumptions and beliefs when talking to people about their views and experience.



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INTERVIEW:



Minister of Mines and Mining Development

**HON WINSTON CHITANDO**



**Fresh lithium discoveries and the establishment of new lithium mines by conglomerates has brought the spotlight to Zimbabwe. This has sparked investor interest with many curious about how they can venture into mining in Zimbabwe. I (KS) spoke to the Minister of Mines and Mining Development Honourable Winston Chitando (WC) on a variety of investment-related topics in the Zimbabwean mining sector and this is how our interaction went.**

**Why should an investor invest in the Zimbabwe Mining Industry?**

**WC:** Zimbabwe's mining sector presents many competitive opportunities to different needs of diverse investors as a result of:

- The abundance of mineral resources;
- Availability of a highly skilled labour force that is willing to work;
- Attractive Investment Incentives;
- Functional systems:
  - o Investor-friendly Mines and Minerals Act – currently being amended to make it more competitive;
  - o Effective and efficient minerals marketing system;
  - o Responsive relevant Government Ministries and institutions;
  - o Progressive policies e.g. Ease of Doing Business and Rapid Results Initiative;
  - o Availability of good basic infrastructure – power, water, rail and road network.

**Can a foreign investor own 100% of a mine in Zimbabwe?**

**WC:** Foreign Investors are allowed to own 100% shareholding for mining operations in all minerals except Diamonds. Investors in diamond mining shall approach any one of the four approved companies for joint venture arrangements.

**KS: How much lithium do we have in Zimbabwe and are there still more opportunities for investors interested in lithium mining?**

**WC:** Zimbabwe has world-class lithium pegmatite deposits at Bikita, Kamativi, Sandawana, Beryl Rose, Benson, Goromonzi and Bepe. With a reserve of 12 million tonnes, Bikita is the largest petalite deposit in the world. There are a lot of opportunities for Investors interested in lithium mining.

**KS: What are the procedures for parties interested in importing lithium (processed or otherwise) from Zimbabwe?**

**WC:** The importation of processed lithium can only be done under a relevant export permit or licence which is issued by the Ministry of Mines and Mining Development. The export of unbeneficiated lithium from Zimbabwe to another country is banned.

**KS: Zimbabwe has the largest resource of lithium in Africa and the has the fifth**

**largest in the world. What measures is the country taking to promote investment in this sector, especially in light of the green transition?**

**WC:**

- The government of Zimbabwe facilitates investment in mineral beneficiation for the processing of manganese, lithium, nickel, cobalt, and graphite to produce battery-graded material for the manufacturing of cell components.
- In December 2022, Zimbabwe banned raw lithium ore exports to minimise the economic potential of artisanal mining and encourage investments in state-approved production facilities.
- The government of Zimbabwe is amending the regulatory framework that is the Amendment of the Mines and Minerals Act and crafting of the Minerals Development Policy. This helps create an enabling environment for investment in green minerals.

**KS: What other clean energy minerals is the country seeking to develop?**

**WC:** Zimbabwe is seeking to develop other clean energy minerals such as oil, coal bed methane and natural gas.

**KS: In light of all this, what is the Ministry's position on fossil fuel resources (hydrocarbons), which the country is still having in great abundance?**

**WC:** Fossil fuels are open for investment in accordance with part XX of the Mines and Minerals Act of Zimbabwe. Potential Investors interested in a prospective area as long as it is open to pegging can make an application to the Mining Affairs Board. Investors must show proof of Value Addition Plans.

**KS: What is the country's general policy on engagement with foreign investors (international relations) in the energy sector?**

**WC:** Zimbabwe is open for business in the energy sector. Potential Investors must go through ZIDA for licensing and guidance on further processes.

**KS: Zimbabwe has just assumed the Chairmanship of the KPCS for 2023. How would you characterize the level of readiness of the country to discharge its leadership mandate successfully during**

**its tenure?**

**WC:** Zimbabwe is ready to lead the KPCS and we have taken steps to ensure the success of the chairmanship. Zimbabwe conducted bilateral meetings with all the KP working groups and Committee Chairs as well as the World Diamond Council and Civil Society Coalition. This was done as a way to share ideas on challenges and opportunities for the Kimberley Process during the year 2023. As the KP Chair, Zimbabwe called for a KP Chairs Strategic Meeting from the 11th to the 13th of January 2023 to formulate work plans for the year ahead. This was conducted successfully and well attended by all Working groups and Committee Chairs. Additionally, the Kimberley Process Administrative Unit was established at the Ministry of Mines and Mining Development to focus on the Kimberley Process Chairmanship of Zimbabwe to ensure the mandate is successfully carried out.

**KS: What opportunities does this chance offer Zimbabwe to develop its diamond mining industry framework and performance?**

**WC:** The KPCS is a global body created under the United Nations General Assembly Resolution 55/56. It is responsible for the eradication of conflict diamonds from the global trade in diamonds. The assumption of the KP Chairmanship is a positive step and a vote of confidence in the Zimbabwe mining industry. The diamond market is sensitive to the perceptions of the origins of the mineral and as such Zimbabwe will benefit in a positive market perception of our diamonds. Leading the KPCS presents an opportunity for the country to have an impact on the global diamond market. The diamond sector in Zimbabwe will grow significantly from the opportunities that the Chairmanship of the KPCS will present to the country. The attainment of a USD 1 Billion diamond sector economy is well on course with the KP Chairmanship definitely going to help in the attainment of the target.

**KS: For the last two years, there has been increased interest in Zimbabwean resources from the international community. Why has this been so?**

**WC:** The coming in of the 2nd Republic has seen the Mining Sector grow significantly. Zimbabwe was nominated for improved

mining jurisdiction by the Mines and Money London Outstanding Awards in 2022. This recognition buttresses Zimbabwe as one of the best mining investment destinations in the world.

**KS: The government seems to have taken a path of prioritising mineral beneficiation. Is this only open to Mineral producers (miners) only?**

WC: Mineral Value Addition and Beneficiation is expected to play a key part in the Mining Sector's role in driving economic recovery and transformation in the implementation of the National Development Strategy 1 (NDS1) and attainment of the country's Vision of an Upper Middle-Income Economy by 2030. Value Addition is not only restricted to miners, Investors are welcome to set up value addition and beneficiation facilities in Zimbabwe.

**KS: The work to produce a national development policy has been long drawn, with the first draft produced in 2013. Investors are keen to see this document finalized. What progress has the Ministry made in finalizing this important document?**

WC: The Draft Minerals Development is now in place. The next stage is stakeholder consultations. This is in line with the mantra of the 2nd Republic of leaving no place and no one behind.

**KS: What are some of the progressive provisions we are likely to see in this document which will enhance the country's attractiveness as a destination for mining investment capital?**

WC: Some of the Provisions in the Policy include:

- Responsible Mining Initiative
- Mining Title System and Administration
- Mineral Resource Governance
- Sustainable Investment
- Gender, Youth in Mining and People with Disabilities Environmental
- Stewardship And Social Responsibility

**KS: How soon could we see the Mines and Minerals Amendment Bill become law? What will be the positive impacts of such a development on the investment environment in the mining sector?**

WC: The Mines and Minerals Amendment Bill is now awaiting gazetting. The remaining processes are expected to be finalized in the first half of 2023.

**KS: The ASGM sector in 2022 did exceptionally well despite challenges in accessing loans to boost production from financial institutions. Why is this so and what can be done to increase confidence in the Small-scale industry?**

WC: The ASGM Sector is performing very well due to growing linkages with the Government. The following strategies can be done to increase confidence in the small-scale industry:

- Provision of the legal and institutional framework for the ASGM sector.
- Increase gold deliveries to Fidelity Gold Refinery (Pvt) Ltd through timely payment for gold deliveries.
- Reduction in mine-related accidents in the ASGM sector through extension service, inspection and training.
- Reduction in usage of mercury and mercury emissions through the use of mercury-free technologies.
- Capacitation of Special Interest Groups through the provision of mining sites, equipment and funding.

**KS: Are there any expos or conferences that are held in Zimbabwe to promote the mineral resources Zimbabwe has to offer?**

WC: A number of conferences are scheduled to take place in 2023 to promote the mineral resources in Zimbabwe.

**i. Inaugural Africa Mining Summit: 20 March 2023**

The Inaugural Africa Mining Summit will be held focusing on the theme of sustainable mining. The Summit will be conducted in a hybrid mode in Victoria Falls, Zimbabwe.

**ii. Mineral Value Addition and Beneficiation Conference: 21 May 2023**

The major goals of the conference are to exchange experiences and techniques in mining and related fields and discuss methods to attract investment in the mining sector downstream and value-addition processes. The Conference will be held in Victoria Falls, Zimbabwe.

**iii. Africa- Middle East – Asia (AFMEA) Conference: 12-16 June 2023**

The AFMEA Conference is an international mining conference for both international and domestic investors. The conference's goal is to create a global dialogue about mining sector development potential. The conference is set to be held in Victoria Falls with mining industry stakeholders from Africa, the Middle East and Asia.

**iv. Zimbabwe Mining Indaba: 5 November 2023**

The main objective of the Indaba is to bring together players in the mineral business to discuss potential investors' expectations as well as methods to invest in and develop the mineral sector in order to harness its economic potential with particular attention to the national legislation.

**KS: What progress has been made with the Mining Cadastre and has this improved our title management system significantly?**

WC: The Mining Cadastre Information Management System commenced with a pilot phase in Manicaland Province which saw the completion of system designs and configurations of the prototype system. The application has been developed and currently undergoing testing. The Mining Cadastre Information Management System is expected to be operational by Quarter 1 2023.

**KS: Due to the abundance of mineral resources across Zimbabwe more and more Zimbabweans are developing an interest in mining what are your thoughts on introducing mining as a subject from the primary school level?**

Mining is one of the pillars of the economy of Zimbabwe. In my view, mining studies must be introduced at primary school level. It is very important to teach mining at this stage in order to catch them young and lay a solid foundation to inculcate in the pupils' emerging skills.

**KS: Some small-scale miners feel sidelined in the lithium revolution. Are they being side-lined?**

The small-scale miners are not being side-lined in the lithium revolution. They have proved to be an asset in other sectors of the mining industry and they can prove their worth in lithium.

**KS: The USD12 billion mining industry by 31 Dec 2023 deadline is less than a year away. Will Zimbabwe achieve this momentous target?**

The Mining Industry remains on course towards the attainment of a USD12 billion Mining Industry by 2023. A number of key projects are expected to come on stream in 2023 including Tsingshan Consolidated Mining and Value Addition Project, Sabi Star Lithium Mine, and Arcadia Lithium Mine, amongst others. These will contribute immensely to the target. ENDS//



# CELEBRATING...



# YEARS

**1983-2023**

The Minerals Marketing Corporation of Zimbabwe has been the sole marketing agent for all minerals produced in Zimbabwe except silver and gold for over four decades.

The Corporation was established by an Act of Parliament in 1982 (MMCZ Act, Chapter 21:04), and it began operations in March 1983.



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# General Manager Mr Tongai Muzenda

**Can you please tell us about yourself and as the person at the helm of the Minerals Marketing Corporation of Zimbabwe (MMCZ) what does your position entail?**

My name is Tongai Matthew Muzenda, the General Manager of the Minerals Marketing Corporation of Zimbabwe (MMCZ). I joined MMCZ in February 2019. I am a holder of a Masters of Business Leadership degree from the University of South Africa and BSc Honours in Economics from the University of Zimbabwe. Having over 30 years of experience I can say I am a seasoned business and marketing leader who has gained knowledge across several sectors including Mining, Agriculture and Public

Sector Services. I have worked for Anglo American Corporation Services Limited in different managerial capacities as well as Marketing and Commercial Director and Chief Executive Officer of Zimbabwe Alloys Limited, a company involved in the production of low & high carbon ferrochrome and ferrosilicon chrome. I was also a Member of Parliament for Gutu West, Masvingo for five years and served as a Deputy Minister of Public Service, Labour and Social Welfare for two years. I have had various directorships in Government entities and private organisations.

## **What my position entails**

As MMCZ our operations are guided by the MMCZ Act Chapter 24:04 and the roles

that are attached to my position are clearly outlined in the MMCZ board charter. These roles include but are not limited to; ensuring that the Corporation is run efficiently and effectively in accordance with the functions of the MMCZ as enunciated in the MMCZ Act, chapter 21:04 and the strategic decision of the board, ensuring that performance objectives, goals, and targets are met.

Furthermore, I am responsible for establishing effective management structures as well as ensuring that there are effective internal operations and implementing governance measures.



### Why should a foreign investor invest in Zimbabwe?

The most common response is that Zimbabwe has vast mineral resources, making it a remarkable resource centre that is appealing to investors. However, as a nation, we are moving away from being known as a resource centre by encouraging investors to come in and set up value-added plants in Zimbabwe, ensuring that the nation receives more value from its exports rather than simply being known as a resource centre.

Aside from direct mining investment, there is a significant opportunity to provide heavy underground mining machinery and other supplies, as well as transportation infrastructure and materials, including railways. The country is also building related and supporting industry infrastructure, such as roads and weighbridges. The government's renewed interest in increasing domestic production of value-added mineral products will necessitate greater capital investments in the mining sector than the current business model, which is based on exporting unprocessed or semi-processed natural resources.

Another factor that favours investors is political stability, and this ensures that their investments are not affected by civil wars or other forms of violence. Zimbabwe is also rich in human capital and is an open economy.

### What does Zimbabwe have to offer better than any other African country?

Zimbabwe has among the greatest deposits for PGMs, gold and base metals – the Great dyke, second only to South Africa's Bushveld complex and very privileged that its resources are still virgin, only slightly exploited; great Li and rare earth elements - bearing pegmatite deposits, which explains the current rush on lithium, hosts some of the rare carbonatite ring complex deposits for vermiculite for which we are one of the few suppliers from the African continent outside South Africa. Zimbabwe has a diversified mineral resource base spanning across all mineral groups – energy minerals (coal, gas, Uranium and Thorium), metallic nonferrous minerals (base metals - copper (Cu), lead (Pb), tin (Sn), nickel (Ni), aluminium (Al), zinc (Zn), etc), metallic ferrous minerals (Iron ores, chrome ores, manganese, nickel ores, cobalt ores, steel, etc), metallic precious metals (PGMs - platinum (Pt), iridium (Ir),

palladium (Pd), rhodium (Rh), ruthenium (Ru); gold (Au), silver (Ag)), nonmetallic minerals (dimension stones - granite and slates; industrial minerals – graphite mica, limestone, dolomite, silica (quartz), kyanite, etc), and gemstones (various coloured gemstones (emerald, aquamarine, other beryls, garnets, tourmalines, chrysoberyls, amethyst, etc and diamond). The country is not fully explored but has a fairly good road and communication network to access the whole country thus offering tremendous opportunities for exploration and new mineral discoveries. In addition, Zimbabwe has the human capital, be it in exploration or value addition or logistics and is centrally positioned in Southern Africa to be a centre of mineral exchanges.

### What activities has the MMCZ carried out to market the country's diverse geological mineral resources to potential investors inside and outside the country under your motto "Revealing Zimbabwe's Mineral Wealth & Heritage"?

MMCZ participates in both local and international exhibitions to search for lucrative markets and market the vast minerals produced in Zimbabwe except silver and gold.

### What are your main marketing platforms and to what extent have you taken advantage of digital technology to enhance your marketing efforts?

MMCZ is a brand on its own, known locally and internationally as the sole exporting authority for all minerals except gold and silver. We receive a number of enquiries from international customers who want to buy minerals and those who want to invest in the mining industry, and from locals who seek partners from abroad. We are also actively pursuing digital marketing through the following platforms: online diamond tenders platforms, e-commerce in process, website and social media.

### We have the deadline approaching (end of the year) for the achievement of the USD12 billion Mining Industry target. What are you doing, as a key entity in the supply chain, to ensure this target is achieved?

To ensure that the vast minerals produced in Zimbabwe are sold at competitive prices MMCZ benchmarks prices against lucrative international markets. Through the bans on exporting unbeneficiated mineral ores, the nation continues to push increased sales of value-added minerals like granite, chrome, lithium and gemstones. At the same time, the Corporation has embarked on a market development exercise to prepare markets for the beneficiated minerals.

To promote the value addition of gemstones, the Corporation together with relevant authorities is setting up a gemstone lapidary. The Lapidary will be offering cutting and polishing facilities and training services on cutting and polishing, gemstone grading and evaluation.

To ensure that all the gemstones exported from the country are accounted for the Corporation appointed subagents. The appointment of sub-agents is expected to bring about higher volumes of gemstones and information on gemstone occurrences in Zimbabwe. The Corporation confirmed the



appointment of eight (8) coloured gemstone sub-agents. The Corporation is still taking applications from individuals and companies who are interested in becoming gemstone sub-agents.

Through the trainings we conduct around Zimbabwe annually, the Corporation continuously encourages small-scale miners to formalize as a way of doing away with leakages.

**What are the mineral marketing opportunities that are found in Zimbabwe and what is the position of MMCZ in attracting new markets for our minerals?**

The country has a large mineral resource base in demand across the globe, these minerals can be legally extracted by small, medium and large-scale miners. Some of these minerals can be sold to local industries to produce value-added products. Other numerous mineral marketing opportunities in Zimbabwe include the fact that miners can sell their products to their own customers, after approval by the Corporation. The Corporation through its brand name attracts a number of customers, who are referred to suppliers of the minerals. The Corporation actively participates in shows, fairs and exhibitions to market Zimbabwe's minerals to international and local customers. We participate in Mine Entra and ZITF, platforms that expose our services to both local and international customers; Mine Indaba in RSA where we meet with international clients and a number of other Fairs and Exhibitions in Dubai and Asia. Polished gemstones, be they diamond or coloured gemstones can be bought by any Zimbabwean for their use or further selling to those niche markets that we may not be aware of. This presents an opportunity for every Zimbabwean as a marketer. Critical is to ensure that as they sell the stones outside Zimbabwe, they do so through the Corporation.

**Which minerals currently you would say need more buyers from across the world due to a shortage of Markets in Zimbabwe?**

We need more buyers for all minerals that we sell locally or export. Market diversification is always good. When one segment of the market is not doing well, maybe the other could be doing fine. That ensures we get maximum value for our minerals as our mission states.

**How much did the country fetch from mineral exports other than gold and silver in 2022?**

As of December 2022 the cumulative total of sales was at US\$3.176 billion.

**Lithium has been popular worldwide due to the green revolution, how much raw lithium was exported from Zimbabwe in 2022?**

There is a misconception on the market



when we talk of the market for lithium. Lithium is a very light metal, number 3 on the periodic table, and very unstable and reactive in air, so are a number of its compounds such as lithium carbonate – the intermediary product to battery manufacturing. More stable are its minerals – spodumene, pollucite, lepidolite, amblygonite, etc. We export these as mineral concentrates, i.e. concentration of each of these lithium minerals is achieved by crushing the ores (rocks containing any of these lithium minerals in quantities that make them economic to extract) to liberate these minerals and picking them to form concentrates through a number of extractive metallurgical processes. We, thus, export lithium mineral concentrates – spodumene, pollucite, amblygonite, lepidolite, etc. Cumulative to date, a total of 86,759.25 mt of these mineral concentrates valued at US\$70.595 million were sold in the year 2022 compared to 33,314.18 mt valued at USD 11.13 million sold in 2021.

**In the gemstone sector, what opportunities are there for investors in terms of buying and exporting all gemstones including diamonds?**

You may be aware that we introduced an SI 256 of 2019, called the Gemstones Subagents Regulations. This was to ensure the inclusivity of all miners and those not able to mine but have a passion for buying and selling coloured gemstones in the value chain of these minerals to create value with what they know best. Miners would mine while subagents would offer alternative markets to miners, sidelining illegal traders all to the benefit of our miners through competitive pricing by the Corporation and Subagents. This created a business opportunity for those with a passion for buying and selling gemstones. We hope to create new gemstone trading businesses and maximize prices achieved by small-scale miners on their production. So investors can actually finance the Gemstones Subagents, creating a cycle of revenue creation in the value chain to the benefit of the citizens and the nation at large. Investors can also come in to set up value-adding and cutting and polishing factories for gemstones in Zimbabwe since the main objective for the mining sector is to push for value addition before our mineral resources are exported in a raw state.

Diamonds are classified as a strategic mineral. As such, there is a government policy on who mines, export or value add this mineral. Miners are any of the four – ZCDC, Anjin Investments (Pvt) Ltd – a joint venture between Zimbabwe and China, Murowa and Alrosa Zimbabwe (a joint venture between Zimbabwe and Russia). Cutting and polishing are however open to any investor local or international. SI 157 of 2010 and SI 79 of 2014 regulate the sales and cutting and polishing of diamonds, while the Finance Act gave price discount incentives to local diamond cutting and polishing entities. All being done to attract more investors.





**The government recently banned the export of raw minerals, as the organisation that markets minerals in Zimbabwe how are you going to ensure that mines that were exporting raw minerals find a market within the country?**

We are encouraging investors to come and invest –foreign direct investment such as green field `

**What are other measures that you're currently undertaking to ensure value addition and beneficiation of the country's minerals?**

We are offering advisory services to producers in terms of markets and prices for beneficiated and value-added products, government through the MMMD has put in place restrictive measures on raw mineral exports through legal instruments while at the same encouraging investors to come and invest in beneficiation and value-addition. This has been done for granite, chrome, diamonds, and lithium minerals.

**What range of business opportunities are available in the marketing sphere for other players to participate in collaboration with MMCZ as the sole marketing agent for all minerals except gold and silver?**

MMCZ has appointed Subagents to participate in the mine-to-market value chain for gemstones, the MMCZ has also entered into strategic partnerships with some diamond cutting and polishing factories for beneficiation of rough diamonds for sale to strategic markets. The Corporation also buys minerals on its own account thereby encouraging small to medium-scale miners to participate in the mine-to-market value chain.

In cutting and polishing of coloured gemstones diamonds and granite slabs, marketing opportunities are open to all individuals – both citizens and aliens as they can all freely buy and export any of these minerals through the Corporation.

**Are there any plans for a central market where semi-precious mineral buyers can just jet into the country, get into the market, look for the stones they desire to buy and leave without travelling across the country?**

Yes, of course. We have a model that has

the supply side and the demand side of semi-precious mineral marketing. SI 256 of 2019 addressed the supply side of that model, modelled along the Mbare-Musika Marketing Model. The demand side is addressed by marketing our semi-precious stones to various markets through Fairs/Shows/Exhibitions and the various digital marketing platforms we are using. The next stage will be addressing the turn-around time for export documentation clearance to be done instantly once payment for the minerals has been done. We will be engaging stakeholders in the export documentation processing chain for a one-stop-shop concept to actualize instant export documentation processing in the marketing model. We believe this can be done under one roof, where Evaluations and Sales can take place instantly, while the same will be extended to online digital platforms for virtual transactions.

Trading centres have many advantages including access to gemstones by buyers and local factories, access to local and international markets, competitive prices are achieved and very effective in terms of gathering and sharing information with our clients and obtaining documentation. It is very necessary for the Corporation and key stakeholders to come up with a

mining economy by 2023.

**Research is the mainstay of any marketing agency. What marketing studies or research have you carried out or commissioned to understand the short-term and long-term dynamics in the global market for the various mineral products that the country is producing and exporting, beyond establishing databases of producers and buyers?**

MMCZ visits many mineral markets around the globe through indabas (Mining Indaba, RSA), Africa Down Under, mineral conferences and exhibitions where both short and long-term mineral and market trends are discussed. In this way, the Corporation keeps abreast of global market developments. In addition to these platforms, MMCZ makes direct visits to end-user factories where mineral products performance is assessed through a firsthand information-gathering process.

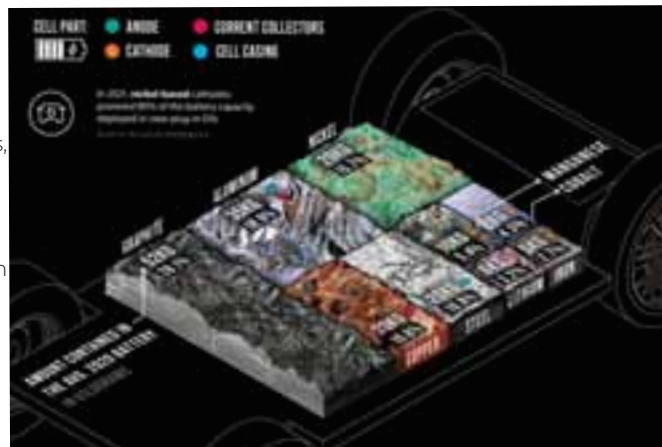
Research has mainly centred on primary data analysis on exports in the different global market segments. We know where most of our mineral products are going, how they move - the logistical challenges and capacities required and what these minerals are used for and our vision, mission and marketing strategy are anchored on such statistical analysis.

**The Main Components of Electric Vehicle Batteries are Lithium, Manganese, Cobalt, Graphite, Steel and Nickel. Are there any open opportunities for these other 5 minerals other than Lithium?**

Of course yes. I alluded to exploration opportunities earlier to open more deposits. There are opportunities to work on the

brown field and greenfield deposits of manganese, graphite and nickel while a number of companies are investing in steel manufacturing.

The country is endowed with manganese, graphite, nickel and copper deposits. Investors and locals are welcome and encouraged to invest in mining, beneficiation and value addition of these minerals. Battery minerals present good investment opportunities for both local and foreign investors. Demand for these minerals is expected to increase in tandem with demand for EVs and clean solar energy.



trade centre and boost gemstone sales. MMCZ has facilities that are used for precious stones sales that can also be utilized for sell of coloured gemstones

You have done exceptionally well in training people across the country. Is this opportunity open to foreign students interested in this initiative?

The trainings are meant to capacitate small-scale miners including special groups as a way of encouraging formalization, growth and boosting of efficiency gains in small-scale mining operations towards reaching the 12 billion

# Dallaglio Chairman Sternford Moyo Bestowed Freedom of City of London Award



**T**he Honorary Freedom of the City of London Award is a recognition of lifetime achievement or high international standing. Dallaglio Investments (Pvt) Ltd Chairman Mr. Sternford Moyo has been bestowed with the Freedom of the City of London for his unwavering commitment to the rule of law and contributions to the international legal profession in general. The granting of this award is extremely rare and generally given today only to royalty, heads of state or figures of global standing.

Mr. Moyo is the Chairman of one of the country's biggest gold-producing companies Dallaglio Investments (Pvt) Ltd. He is also the Chairman and Senior Partner at Scanlen and Holderness law firm based in Harare. Mr. Moyo's award was in recognition of his outstanding work as the President of the International Bar Association (IBA). Notably, he is the first person from Africa to serve as IBA President.

*I want to thank the City of London, the IBA and the Law Society of England and Wales for their support, and Alderman Sir David Wootton for nominating me for this prestigious award*  
- Sternford Moyo

In his remarks, Moyo said, "It is a great honour to receive from the London City Corporation this Freedom. In fact, it has been one of the most special events of my life. I regard London as my second home, and the International Bar Association has strong roots in England's capital city. I want to thank the City of London, the IBA and the Law Society of England and Wales for their support, and Alderman Sir David Wootton for nominating me for this prestigious award."

"It has been my good fortune to have met, and to be, working alongside such incredible colleagues as the IBA Officers here today, including Mark Ellis, who I have worked with now for more than twenty years following our first meeting in Harare where we discussed the rule of law, administration of justice and the independence of the judiciary in Zimbabwe. I could not have conceived two decades ago that today I would have the good fortune of being seated in this

remarkable city, with my family and fellow upholders of the rule of law the recipient of such an accolade."



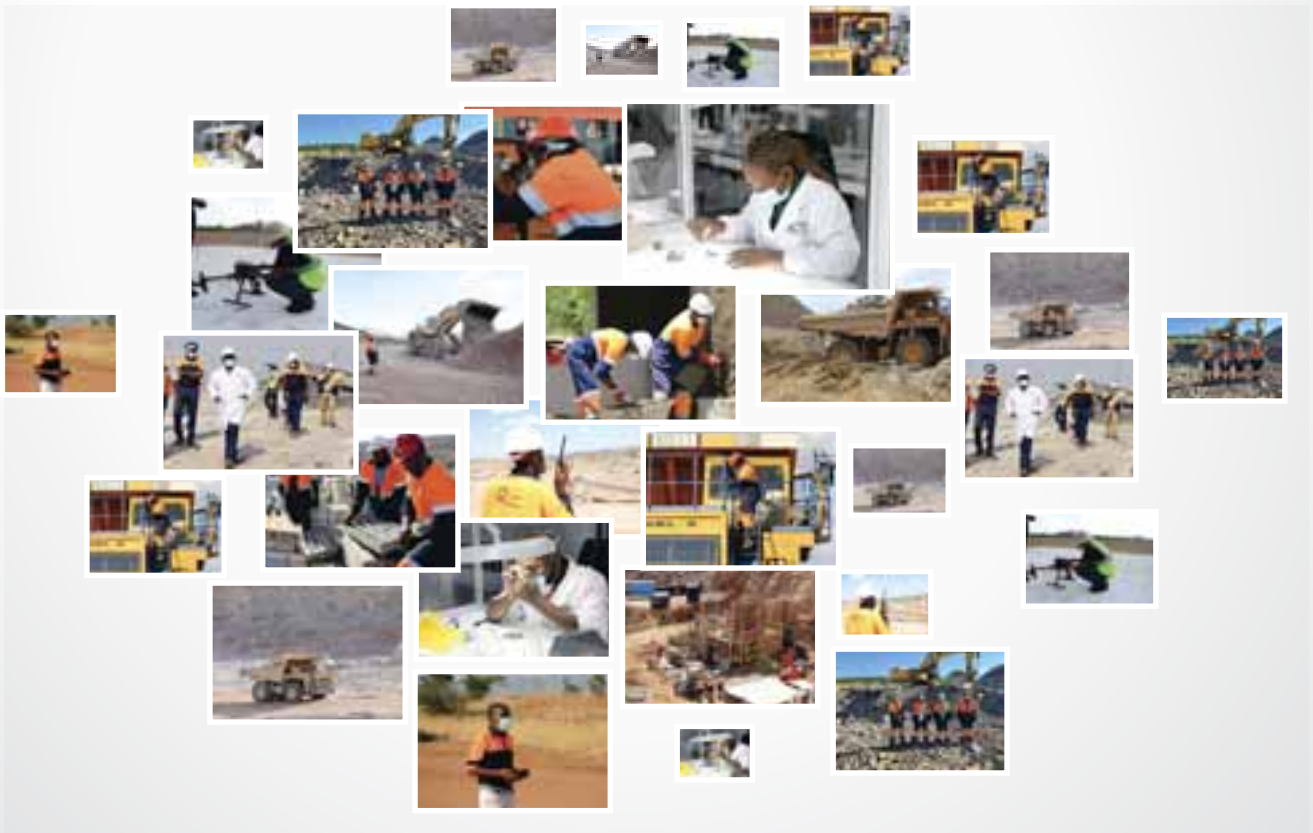
**Freedom of the City of London**

Sir David Wootton, former Lord Mayor of the City of London, who nominated Mr. Moyo for the Freedom, said: 'It is a pleasure to welcome Sternford Moyo as a Freeman of the City of London. As the first person from the continent of Africa to be elected President of the IBA, he has already contributed so much to the international legal sector, and his commitment to the rule of law is something very much shared by the City of London.'

Dallaglio as well as the wider mining community would like to congratulate Mr. Moyo on this outstanding achievement.



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ZCDC is committed to the highest standards of environmental protection, the safety and health of its employees, their general welfare as well as that of the community and its various stakeholders.





## INTERVIEW: ZCDC CEO Dr. Mark Mabhudhu

*By Keith Sungiso*

**D**r Mark Mabhudhu (MM) is an extraordinary Chief Executive Officer, he is not new to the mining industry, but an expert with experience

spanning 30 years with 27 of those years being in the diamond industry alone, both locally and internationally at senior executive and board levels. His geographical mobility in the industry is punctuated by extensive knowledge in mining gold, platinum and related minerals with vast experience in the De Beers family of companies, one of the world's largest diamond mining companies. He currently heads the world-renowned Zimbabwe Consolidated Diamond Company (Pvt) Ltd (ZCDC) a diamond mining company wholly owned by the Government of Zimbabwe.

I spoke to the larger-than-life diamond expert who shed the light on the operations of the giant diamond mine and this is how our interaction went.

**KS: How many people are employed by ZCDC and what percentage are women?**

ZCDC employs 2000 employees directly with a further 1000 as contractors in various segments of the diamond mining value chain. The proportion of women is rising steadily and has now reached 14%

of the entire workforce.

**Is there any value addition currently being undertaken on Zim diamonds?**

Value addition on Zimbabwe diamonds is happening partly within the country via the more than 12 cutting and polishing factories which currently exist under the auspices of the Diamond Beneficiation Association of Zimbabwe (DBAZ). 10% of our diamond production is sold to these factories for value addition whilst 90% is sold on the international market. As you know already, the country is making huge strides to increase the quantum of carats which are value-added locally in order to develop the industry as well as create employment for Zimbabweans.

**How many carats did Zimbabwe produce in 2022?**

In 2022, Zimbabwe produced in excess of 5 million carats from all the producing companies.

**We are closer to the 12 billion dollar mining industry deadline. As diamond producers will you meet your set target?**

As diamond producers, we are set to meet our side of the bargain which is to not only meet the target but to exceed

the USD1Bn contribution from the diamond sector.

**You are highly regarded as a legendary figure in the diamond industry. What have you achieved since your re-appointment as CEO?**

Thank you very much for the commendation. Since my appointment in September 2020, I have done a significant lot which I can't enumerate in this space. Importantly though, I have managed to turn around the organization from a loss-making entity since its inception in 2016 to one that has made a profit for the years 2021 and 2022. This to me is the hallmark of a successful organizational turnaround.

**In 2021 ZCDC used a Diamond recovery technology called X-Ray Transmography what exactly is this?**

This technology is one of the most recent technologies used in the processing and recovery of diamonds which is quite efficient and effective and has literally obliterated the antiquated methods from the olden days like DMS and many others. This technology is so cost-effective to the extent of it bringing diamond recovery costs to a fraction of the old ways.



**Some of us have never been to a diamond mine, take us through the process until the finished product.**

The diamond mining and recovery process is very straightforward, but this does not in any way imply that it is a simple process. It has its own complexities which I cannot describe fully in this space.

In short, the process at an operating mine starts with the mining process where-upon the diamond ore is drilled, blasted and hauled to the processing plant. The ore needs to be exposed first by removing waste (in open pit operations) before the drilling and blasting. The ore is then hauled to a crushing facility where the process of liberating the diamonds from the host matrix begins (primary crushing). This process is performed diligently to ensure that the large diamonds are not destroyed/broken in the process. The ore is then conveyed to the process plant where diamond recovery is done through the Dense Media Separation plants as well as XRTs. The process of recovery is an iterative process as the ore is carefully crushed/ liberated through the secondary stage, tertiary stage as well as the quaternary stage. The process is done repeatedly until the final waste is generated disposed to the tailings dump. As this process is done, the security of the diamond is paramount. The various processes are all hands-off and fully covered by a Closed-Circuit Surveillance System to ensure zero pilferage of the diamonds. The final sorting is done in a highly secured building which has controlled access. This is briefly what you will see at a diamond operation if you visit one.

**ZCDC has gone for over 2.6 million fatality-free shifts! How have you managed such an impressive record?**

ZCDC (Pvt) Ltd is a values-driven organization. The decisions we commit to and the actions we undertake are all in line with our organizational values. One of our values is Zero Harm, and it is the responsibility of all employees and stakeholders in our business to live that value. We operationalize this through our way of working (WoW) which focuses our attention on doing things Safely, Securely, Smartly, and Sustainably but Aggressively.

**Michael who is based in South Africa would like to purchase diamonds from ZCDC, how does he go about it?**

Our diamonds are sold through the Minerals Marketing Corporation of Zimbabwe (MMCZ) which is the official selling agent of the mineral in the country. In this regard, Michel can contact MMCZ directly for further information or ZCDC Marketing Department who will direct them to MMCZ for further processing.

**Zimbabwe is the current KP Chair, what does this mean for the Zimbabwe diamond industry?**

The fact that Zimbabwe is the current KPCS Chair means a lot to Zimbabwe as a country and the Zimbabwean diamond industry. This has given the country and its diamonds credibility and we have demonstrated that we can be a trusted country in terms of providing leadership in the global diamond industry. Importantly, this means that our diamonds are ethically and responsibly mined. They are clean and are used for development as well as the upliftment of the quality of lives of the common people.

**Are there any online sales or auctions ZCDC conducts, and how does one participate?**

ZCDC, together with MMCZ as the selling agent are in the process of developing an online selling system which will be commissioned in due course. Once the system is fully commissioned, the product buyers will be alerted.



**What is ZCDC doing for the communities it is operating in?**

ZCDC is doing a lot in the communities in which we operate. As a company, we have now moved from just seeking to obtain the social license to operate to entrenching lasting socio-economic value. We are doing agricultural projects for the community to support food security initiatives, education support, health services provisioning, road infrastructure maintenance as well as investing heavily in the community through our consumables buying initiative where-upon all the food which is consumed at the mines is sourced and obtained from

the local community.

**What is the current life of mine for Chiadzwa diamond fields and are there any fundamentals in place to extend the life?**

As an operation, we still have a long way to go, and we are still carrying out intense exploration to extend the life of mine. Preliminary indications show a mine of life extending beyond 20 years. This figure will be changing as we expand operations in future.

**Is ZCDC cutting and polishing locally?**

As ZCDC, we have not commenced the aspect of cutting and polishing our diamonds as part of the value chain. This is a futuristic strategic direction for the organization and will be incorporated into the bigger scheme of ZCDC's value addition and beneficiation strategy.

**Did Zimbabwe ever produce diamonds worth \$15 billion?**

No. This question has been asked several times and I cannot purport to be able to answer it correctly as I am not privy to the background which led to this proclamation.

**What is ZCDC doing to support tertiary institutions to ensure it gets quality human resources from within Zimbabwe?**

ZCDC, as I indicated earlier is supporting the education of professionals in technical universities and colleges through bursaries and scholarships. We have various initiatives to ensure the development and nurturing of both the technical and leadership talent for the future of the organization. We also run

apprenticeship programs to ensure that the organization has sufficient engineering capacity and the capability to ensure sustainable operations.

**Besides the diamond business, what's Dr Mabhudhu into?**

I am simply a diamond mining professional through and through. I have spent nearly three decades in this domain and I do not wish for anything else. On a lighter note, I am an avid sports fan and love to watch good football as well as sub-lime tennis.

*Preliminary indications show a mine of life extending beyond 20 years - Mark Mabhudhu*

# Boltgas evolving into a trusted brand in the sub-region



**B**OLTGAS, a leading supplier of engineering solutions, is evolving into a trusted brand across the central and southern African region where it continues to secure mandates – one after another – to implement high-profile projects from some of the African continent's household names.

Having started operations nearly two decades ago, Boltgas has not only managed to dominate the Zimbabwean market but has successfully extended its reach into several markets in the sub-region as the company prepares to stretch its influence into the rest of the Eastern African region, before going all the way into North Africa.

Currently, Boltgas has two mega projects that are up and running in neighbouring South Africa, and in the Democratic Republic of Congo (DRC).

To the south of the Limpopo River, Boltgas has established a solution centre in what is undoubtedly Africa's largest economy to make it easy for its sales force to service their clients given South Africa's strategic location to coastline borders of the Indian Ocean to the south-east and the Atlantic Ocean to the south-west.

About the solution center Matthew Sibanda, the CEO of Boltgas, had this to say: "We source from leading brands in steel products, filtration hydraulics, mineral processing, ground support, materials handling and transmission technology, etc., and distribute their quality and customised products and services to our valued customers to

ensure that they enjoy an uninterrupted service all-year-round. By listening to our customers and understanding their operational challenges, we are able to provide solutions and supply chain reliability to help them enhance their productivity."

In the DRC, Boltgas landed a contract to design and construct a sulphuric acid leach plant for one of the major mines in Katanga Province. Work on the projects already in progress and expected to commission end of May 2023 Boltgas has been involved in the region since the late 2000s, with some of its projects having been finalised in Mozambique, Botswana and Zambia and South Africa, coal gasification project for Eskom and Leaching agitators for Crossing Uranium Mine in Namibia.

In Zimbabwe, the company has participated in a number of contracts, amongst them the establishment of a power separation plant and substation for ZimChem Refineries; the construction of a gantry and pipework for Polyoak Packaging and the design and installation of the Wattle Company's conveying system and incinerator, Murowa Diamonds 14km pipeline, Mimosa Platinum Mine 1mw mine ventilation extraction fan

At the Pretoria Portland Cement, otherwise known as PPC, Boltgas was involved in the upgrade and maintenance of the company's dust extraction system, while they have been responsible for the installation and maintenance of the Zimbabwe Platinum Mines' dust bags and

dust extraction industrial filtration solutions.

Boltgas started off in 2005 as a supplier of engineering services and solutions in design and detailing, structural steel works, plate works, pipe works, plant refurbishment, rehabilitation and maintenance, site works, fabrication, machining, installations, etc. The business has evolved over the years into a total provider of engineering solutions that enable their clients to keep their plants and machinery up and running to enhance their top line through reduced downtime and increased productivity.

Boltgas' coverage extends to every inch of the country and have now taken their brand across the borders, as they push harder to being a pan-African provider of engineering solutions.

Not so long ago, they acquired National Metal Foundries in Bulawayo, opening the group to many possibilities in the engineering field. The acquisition has enabled Boltgas to diversify into National Metal Foundries' core business of manufacturing cast-iron, aluminium, bronze and brass from scrap metal as well as general engineering, and taking the products across the length and breadth of Zimbabwe as well as into the sub-regional markets.

In addition, the engineering arm of the group went through a successful restructuring after going into a joint venture that gave birth to Boltrec Engineering whose mission is to provide customized engineering solutions that satisfy stakeholder needs. Boltrec now stands shoulder-to-shoulder with the world's best as a reputable engineering company designed to harness custom-made engineering solutions for its clients through formulating various synergies with industry leaders.

A proudly Zimbabwean company, Boltrec provides total engineering services and solutions in structural steel works, fabrication, precision machining, crane services, line boring, plant maintenance, installations, commissioning and training, component building, facilities maintenance, draughting and design, brick and paver moulding, project management as well as engineering skilled labour hire.

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Our practical ethos of delivering BETTER, SAFER, MINING, through retained expertise, know-how and experience, enables Mine Machines to customise and provide full 'suites' of Trackless Mining Equipment, to suit the exact needs and operating conditions in this market. From low profile, to narrow vein to mass mining products including loaders, trucks, drills, bolters and utility vehicles.

In association with GHH Group, Mine Master, Fletcher and UVBotswana, the

proven and familiar faces of Trackless Mining Machine reliability, have some new and exciting additions, specifically designed for Zimbabwe's increasingly mechanised mining demands. The latest released LF-10 NEO, is a powerful and compact 10-ton, 240kW loader. It is the latest in a line of new GHH loaders like the LF-14, the LF-7 and the LF-8. The LF-10 NEO has a z-link design with the maximum tipping height in its class, of 2.5 m, which is perfect for truck loading all 30 ton trucks in the market. "The high break out forces, efficient boom and bucket motion times as well as the strong power-to-weight ratio makes the LF-10 NEO one of the best in class," says the company. With a length of 9,6 m and width of 2,6 m

the LF-10 NEO is very compact and versatile for excellent manoeuvrability in a mid-seam underground mining environment. The recently released UV60D, 6-ton payload, cassette carrier range of utility vehicles is also hitting the market in full force with the vast range of cassette offerings general purpose, ANFO explosives, diesel, lube, multi-purpose, maintenance, scissor lift, bowser, engine oil and hydraulic oil as well as customizable cassettes.

With over 220 TMM's in Zimbabwe, Mine Machines' advances qualified technicians, through our in-house Mining Skills Training Centre, developing self-supporting expertise, know-how and local experience, in support of workshop and on-mine-site maintenance facilities, ranging from component repair to full OEM accredited rebuilds, customized and tailored field service or performance contracts. Mine Machines is able to support products from new machines sales to aftermarket support through the life of the machines.

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# ZIMBABWE THE COUNTRY WITH PLENTEOUSNESS OF MINERALS

**Z**IMBABWE is home to 60 different types of minerals, 40 of which have been traditionally exploited to varying degrees.

Platinum group metals (PGMs), chrome, gold, coal, and diamonds are the main minerals. Other minerals found in the country include gemstones, granite, manganese, lithium, asbestos, iron ore, copper, nickel, cobalt, limestone, coal-bed methane (CBM) and rare earth minerals.

With over 2,8 billion tons of PGM and 10 billion tonnes of chromium ore, the nation has the second-largest platinum deposit and high-grade chromium ores in the world. Approximately 12% of the nation's gross domestic product is made up by this sector (GDP).

The government estimates that by 2023, the industry will have the capacity to produce US\$12 billion annually. However, analysts have cautioned that this is anticipated to occur if only the government addresses issues including ongoing power outages, a lack of foreign currency, and policy uncertainty.

Low foreign exchange retention requirements have presented difficulties for mineral exporters, especially when the black-market exchange rate significantly deviated from the official rate and encouraged smuggling.

According to Prof Mthuli Ncube, Minister of Finance and Economic Development, the mining industry was predicted to grow by 10% in 2022, up from the mid-year prediction of 9,5%. This is primarily caused by the anticipated rise in the production of coal, PGMs, chrome, nickel, diamond, and gold, which is supported by record-high global commodity prices and increased investments in the industry.

The prognosis predicts that the mining industry would expand by 10,4% in 2023, supported by expected high worldwide mineral prices and an increase in investments, particularly in exploration, mine development, and mechanization.

Due to new mining activities that are currently being explored, the sector is anticipated to continue growing in the medium term, until 2025.

Gold, PGMs, chromium, coal, diamonds,

lithium, nickel, black granite, copper, silver, and asbestos are the most mined minerals in Zimbabwe.

Below, we briefly examine them.

## Gold

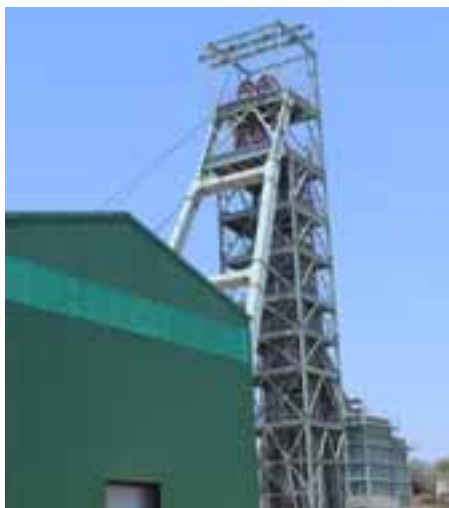
One of the most mined minerals in Zimbabwe is gold. According to the Ministry of Mines and Mining Development, gold has been mined and explored in Zimbabwe since ancient times. From the seventh century until the introduction of mechanized mining techniques with the arrival of Europeans about a century ago, it is estimated that a third (or about 700 tonnes) of all historical gold production was mined locally.

According to the Ministry, there are more than 4000 documented gold deposits, almost all of which are situated on historic workings.

Due to new mining ventures, prompt payments, and incentives for miners, Zimbabwe's gold output increased to a new record high of 35,38 tonnes in 2022.

Statistics from Fidelity Gold Refinery, the





only buyer of gold in the nation, show that the output increased by 19,5% from the previous year.

According to the Reserve Bank of Zimbabwe, the country in southern Africa possesses the second-largest gold reserves per square kilometre in the world, with 13 million tonnes of confirmed deposits, only 580 tonnes of which have been used since 1980.

Top gold producers in Zimbabwe include Freda Rebecca, which is near Bindura's Trojan Nickel mine, Blanket Mine in the province of Matabeleland South, Rio Zimbabwe, Metallon Corporation, Sabi gold Mine, Falcon Gold, Pickstone Peerless, Duration Gold Mine, Bilboes Holdings, and Eureka Gold Mine.

Small-scale producers currently lead the sector.

### Platinum Group Elements

Due to their numerous industrial applications, PGMs, which include platinum, palladium, rhodium,

ruthenium, iridium, and osmium, are in high demand all over the world. The second-largest platinum reserves in the world are found in Zimbabwe's Great Dyke, a linear early Proterozoic layered mafic-ultramafic intrusion trending over 550 km with a maximum width of roughly 11 km.

According to the Ministry of Mines, the Dyke is home to an estimated 2,8 billion tonnes of PGM ore grading 4g per tonne. Notably, only in the South African Bushveld and along the Zimbabwean Great Dyke are PGMs exploited as primary metals.

PGM mineralization was discovered in the Great Dyke in the early 1920s.

Between 1925 and 1926, there was a surge in PGM prospecting as a result of these documentations and the discovery of PGMs in the Merensky Reef of the South African Bushveld Complex, leading to the discovery of the Wedza Mine. Numerous businesses have engaged in exploration since the 1950s. Global Platinum Resources and CAMEC (Todal Mining) are now conducting platinum exploration on the Great Dyke in the Bougai region of Shurugwi and Chegutu, respectively.

The Mimosa, Ngezi, and Unki Platinum Mines are currently operating as mines. Exploration and assessment of Zimbabwe's platinum deposits have increased due to the demand for PGMs.

### Diamonds

In Chiadzwa, Mutare West, Zimbabwe, there is extensive small-scale diamond production in the Marange diamond resources. According to the Ministry of Mines, more than 120 kimberlites have been found, but only two deposits—the

River Ranch and the Murowa Diamond Mines—had economically significant grades.

According to the Ministry of Mines, evaluation is now being done on a number of kimberlites in the country's southern region, however, some were discovered to be non-commercial. Recently, many diamond mines in the Chiadzwa region have opened as a result of the finding of diamondiferous Proterozoic conglomerates in the Umkondo basin, including Mbada, Marange Resources, and Anjin.

According to the Chamber of Mines, the production of diamonds was predicted to increase by 19% last year to five million carats from the 4,2 million produced in 2021. As part of an ambitious goal to enhance mining output and bring in US\$12 billion annually, Zimbabwe anticipates increasing diamond production to 11 million carats by 2023.

### Chrome

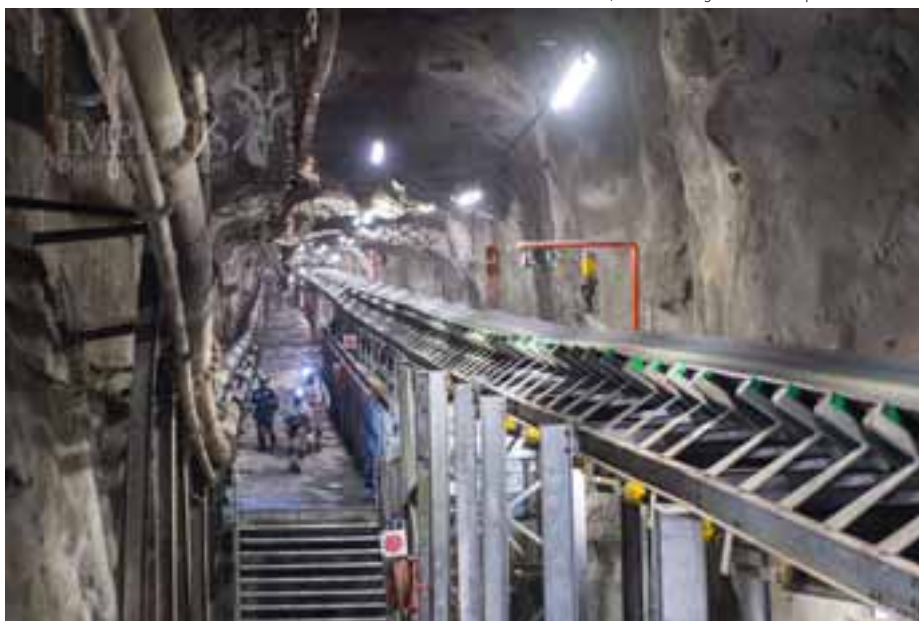
In addition to diamonds, platinum group metals, and gold, chrome is one of Zimbabwe's principal exports. With deposits of roughly 10 billion tonnes, the nation contains the second-largest high-grade chromium ores in the world, behind South Africa. Chrome is primarily mined from the seam and stratiform deposits along Zimbabwe's Great Dyke. It can be found as serpentinites with podiform structures in greenstone belts away from the dyke, such as in the Zimasco mine on Shurugwi Mashava.

In Mashava, south of Mberengwa in the Limpopo mobile belt, chromium is discovered in the remains of greenstone. In the greenstone zones, chrome can be found as alluvial deposits as well. Chrome is primarily utilized in the manufacture of stainless steel, as a metal coat, in the chemical sector, and metallurgical procedures.

### Nickel

According to the Minerals Marketing Corporation of Zimbabwe, nickel is only processed at Bindura, where the Trojan mine is located and is currently produced commercially at two mines, Shangani and Trojan. Less than 8 kilometres to the south of the Bindura town centre is where you'll find the Bindura Smelting and Refinery.

Nickel is found in Zimbabwe's Archean craton in komatiitic-composed rocks, such



as those found at Trojan Mine. For Empress, Madziwa Great Dyke, it also seems to be stacked or unlayered mafic-ultramafic intrusive bodies. It can also be found in nickel laterite deposits, such as those in the northern Great Dyke hydro-thermal shear zone.

Around the nation, there are nickel deposits in a number of serpentinite regions in greenstone belts with igneous complexes. The country has got huge potential in komatiite and laterite and more than 30 nickel deposits are known.

### Asbestos

Chrysotile is one kind of asbestos. It can be found in enormous serpentinites, slip fibre zones, and ultramafic complexes that are packed with matted fibres in the Great Dyke, such as the Mashava Igneous Complex and the Ethel mine. 60 deposits have been worked on for chrysotile and are dispersed throughout the Masvingo, Insiza, Gwanda, Mberengwa, and Shurugwi.

Prior to the demand reduction, Zimbabwe was the third-largest producer of asbestos in the world. Asbestos used to be the second-largest revenue generator in the mining industry, behind gold. Gaths Mine and Shabani Mine were closed, which put an end to production.

One of the largest asbestos miners, Shabanie-Mashava Mines (SMM), has made repeated failed attempts to restart operations. Even now, the mine's production hasn't been started, despite plans to do so in September 2019 when the dewatering of flooded shafts was finished. SMM is thought to possess asbestos reserves worth more than US\$1 billion, and if the company's mines are reopened, they will generate roughly 75,000 tonnes of high-grade fibre, largely for export.

### Copper



In Zimbabwe, there are more than 70 copper deposits that have generated copper as a primary or secondary product. The Magondi Basin, which spans more than 150 kilometres, has been the primary producing region. Similar copper resources can be discovered in the Umkondo Basin in the southeast of the nation. Numerous copper possibilities can also be found in hydrothermal formations in granite and Archaean Greenstone Belts, such as Inyathi and Copper Duke. After Mhangura was shut down, primary copper production all but halted. Current PGM, gold, and nickel operations are connected to copper production. There is still a huge amount of exploratory potential, it is thought.

Copper production has been declining in recent years because of the depletion of known reserves and low exploration expenditure levels, according to the Chamber of Mines of Zimbabwe.

### Black granite

An estimated 150 000 tonnes of granite are produced in Zimbabwe each year, with the Mutoko district producing roughly 75% of the total amount of black granite. Ilford Red, Natural Stone, CRG, Zimbabwe International Quarry, and the province of Mashonaland East's Mutoko Granite Mining Company are a few of the businesses that mine granite there.

### Silver

Silver is the other resource that has primarily been mined in Zimbabwe. According to the Mines Ministry, silver is found naturally in combination with other minerals including gold, copper, and lead. It is classified as a by-product of the mining of platinum, gold, and copper, with the exception of the Osage Mine in Zimbabwe. The highest silver-to-gold ratios can be found in the gold deposits of the Odzi greenstone belt. The locations of the

mineral are mostly Makoni, Makonde, and Kwekwe.

### Lithium



Zimbabwe is the sixth-biggest producer of lithium in the world and is thought to have the greatest untapped resource in Africa. The greatest lithium mines in the nation are found at the Bikita mine, which is 308 kilometres south of Harare, the capital.

Other lithium mines include Kamativi Lithium Mine, Sabi Star Lithium Mine, MIRRORPLEX Lithium Project, Zulu Lithium and Tantalum Project, Step Aside Lithium Project, Kamativi Lithium Project, and Arcadia Lithium Mine, which is expected to produce 2,5 million tonnes of lithium ore per year.

According to the Ministry of Mines and Mining Development and the Minerals Marketing Corporation of Zimbabwe, the areas with confirmed lithium deposits in Zimbabwe are Goromonzi, Mudzi, Buhera, Bikita, Chegutu, Hwange, Harare, Insiza, Rushinga, Mutoko, Mutare, and Hwange. However, lithium is still being found in numerous locations all around the nation. The mineral has so far been found in locations including Mberengwa, Shamva, Bindura, and Kadoma.

Due to its high electrochemical potential, lithium has emerged as a crucial component in the production of high energy-density rechargeable batteries as the world moves toward clean energy, particularly electric mobility.

Since lithium-ion batteries are now 30 times less expensive than when they initially entered the market in the early 1990s, battery manufacturers believe that they will continue to dominate the sector.







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# CHEMPLEX CORPORATION LIMITED



## REQUEST FOR EXPRESSION OF INTEREST

Chemplex Corporation Limited would like to invite interested and qualified partners to bid in the tender for the tributary arrangement on the base minerals at G&W Industrial Minerals Private Limited for the extraction, beneficiation and value addition where possible of these base minerals. The base minerals and respective mining claims as listed below. The tributary arrangement will be as per the provisions of the Mines and Minerals Act CHAPTER 21:05

MINE NAME	PROVINCE	MINERAL(s)	AREA(Ha)
KY Mine	Mashonaland East, Mudzi	Calcite & Kyanite	384
Earlyworm Mine	Mashonaland Central, Concession	Limestone	86
Mica	Mashonaland West	Mica	25
Nyore Nyore	Mashonaland West, Makonde	Kaolin	96
Tinde	Matebeland North, Binga	Fluospar	25
Beitbridge	Matebeland South	Ball Clay	511
Mberengwa	Midlands, Zvishavane	Talc	386
Zoe Mine	Midlands	Red Oxide	25

Interested bidders are required to obtain the tender documents that consists of the bidding procedures and statements of requirements upon sending their request by email to [chitsikaf@zimphos.co.zw](mailto:chitsikaf@zimphos.co.zw); and copy [chitagus@zimphos.co.zw](mailto:chitagus@zimphos.co.zw). Upon receipt of request for tender documents, Chemplex Corporation will reply with the tender document requested.

Due date for submission shall be shall be **20 February 2023 at 1000HRS**. Tenders should be submitted in a TENDER BOX at **Zimbabwe Phosphate Industries, Off Mutare Road after Pick n Pay Msasa, Harare** in a sealed enclosed envelope and clearly marked with the Tender number and tender description on or before the closing dates and times.

**NB: For Site visit, bidders must have protective clothing.**

Please note that **NO** payments are required for the above-mentioned tenders.



# CHEMPLEX CORPORATION LIMITED



## Expression of Interest (EOI) for Bauxite mining partnership in Zimbabwe

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Chemplex Corporation Limited (Chemplex) wishes to establish a Bauxite Mining partnership arrangement with a Company with a viable Bauxite Deposits in Zimbabwe. The partnership Company will develop and exploit the Bauxite Deposit for at least 20 years on the following options:

1. The potential partner will develop and exploit the Bauxite Deposit with Chemplex being an off taker of the bauxite produced to be used in water treatment chemicals production.
2. Alternatively, the potential partner will tribute the bauxite deposits to a Joint Venture Company created by the parties. The Joint Venture will run operations from mining of bauxite, beneficiation and value addition into water treatment chemicals production.

The partnership Interested parties should provide information detailing:

- i. Bauxite deposit ownership and location
- ii. Size of bauxite deposit and bauxite grade (at least 49 %  $\text{Al}_2\text{O}_3$  for bauxite content)
- iii. Bauxite Mining/Production records
- iv. Reports of Geological work done on the Deposits preferably SAMREC
- v. Partnership option preferred

Interested bidders are required to obtain the tender documents upon sending their request by email to [mhlangan@zimphos.co.zw](mailto:mhlangan@zimphos.co.zw) and copy [mukorerag@zimphos.co.zw](mailto:mukorerag@zimphos.co.zw), [nyamutswak@zimphos.co.zw](mailto:nyamutswak@zimphos.co.zw) Upon receipt of request for tender documents, Chemplex Corporation will reply with the tender document requested.

Due date for submission shall be **27 February 2023 at 1000HRS**. Tenders should be submitted in a TENDER BOX at **Zimbabwe Phosphate Industries, Off Mutare Road after Pick n Pay Msasa, Harare** in a sealed enclosed envelope and clearly marked with the Tender number and tender description on or before the closing dates and times.

Please note that **NO** payments are required for the above-mentioned tenders.

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Zimbabwe Miners Federation (ZMF) President Ms Henrietta Rushwaya

# ASM GOLD MINERS IMPRESS IN 2022

Artisanal and Small-Scale Miners (ASM) in 2022 evoked admiration with record-breaking gold deliveries to Zimbabwe's sole gold buyer and exporter Fidelity Gold Refinery (FGR) thereby breaking the country's gold delivery record by the ASM sector.

Rudairo Mapuranga

The Henrietta Rushwaya-led Miners' gold deliveries increased by 30.3 per cent to 24 tonnes, a record for a single year, from 18.5 tonnes delivered in 2021. Deliveries by large-scale producers were approximately 11.2 tonnes in 2022 as well as in 2021.

During the year, deliveries to FGR achieved the 2022 projected target of 35 tonnes marking an 18.9 per cent increase from 29.7 tonnes delivered in 2021.

However, deliveries during the last quarter of 2022 decreased by 10.3 per cent from approximately 10.7 tonnes delivered in 2021 to 9.6 delivered in 2022.

Experts attributed the improved contribution of small-scale producers to timeous payments to the miners by FGR, the country's main buyer of the metal.

In 2021, the Reserve Bank of Zimbabwe (RBZ) announced a 5 per cent incentive for gold

deliveries above 20kg by small-scale miners. This was done in an attempt to curb the rampant smuggling of precious metal.

During the period January to November 2022, gold deliveries increased by 31 per cent to 33.3 tonnes from the same period last year. During the period, Artisanal and Small Scale Miners (ASM) contributed over 68 per cent of the deliveries (22.9 tonnes) while the primary producers contributed 10.4 tonnes.

Gold deliveries also increased by 33.8 per cent during the first 10 months of the year compared to the same period last year, raising the prospect that Zimbabwe might achieve the 40-tonne target for this year.

According to FGR General Manager Mr Peter Magaramombe, the massive increase in deliveries has been necessitated by a host of measures taken by FGR and the Reserve Bank of Zimbabwe (RBZ) including timeous payments and incentives.

"The 5% Gold incentives to the small-scale miners are key, timeous payment to our miners, and incremental good incentives to the large-scale miners," Magaramombe said. The 33.784 per cent increase saw 29 460.6532 Kg of gold being delivered by the end of October 2022 compared to 22 024.3507 kgs delivered during the same period last year.

*The Henrietta Rushwaya-led Miners' gold deliveries increased by 30.3 per cent to 24 tonnes a record for a single year, from 18.5 tonnes delivered in 2021.*



Artisanal and Small-Scale Miners (ASM) contributed 67.8 per cent of the total deliveries, sending 19 987.6292 kgs compared to 9 473.0240 kgs delivered by the large-scale producers. ASM deliveries increased by 54.3 per cent from 12952.3801 kgs delivered during the same period last year with large-scale producers' gold deliveries increasing by 4.4 per cent from 9071.9706 kgs delivered during the same period in 2021.

Gold deliveries to FGR in the nine months to September 2022 grew by 36 per cent to 25,7 tonnes, from 18,9 tonnes in the same period a year earlier.

According to FGR statistics seen by this publication, overall deliveries stood at a 41.0734 per cent increase to 22290.4183 kgs during the period January to August of 2022 compared to 15800.5779 kgs delivered during the same period last year.

Large-scale producers increased their gold delivery by 5.02535 per cent to 1086.5330 kgs in August 2022 compared to 1034.5436 kgs in the same period last year. The Artisanal and Small-Scale Miners (ASM) increased their deliveries by 18.2789 per cent to 2263.2531 kgs in August 2022 from 1913.4886 kgs in August 2021.

FGR is confident that gold deliveries to FGR will reach 40 tonnes this year as a result of notable expansion projects by Large producers as well as the growth in ASM projects.

According to FGR General Manager Mr Peter Magaramombe, his organisation is confident that if the government maintains gold delivery supportive arrangements in place ( gold incentives schemes, 100 per cent retention for ASM to mention a few) deliveries will increase to even surpass the 40 tonnes gold target. "Why 40 tonnes? FGR is expecting to see growth in gold deliveries from the Large Scale Miners sector mainly due to notable expansion projects by Blanket Mine, Freda Rebecca (Shamva), Eureka Gold Mine and Riozim (Cam and Motor). Growth in the ASM sector is to be sustained by favourable pricing, availability of cash and the retention of the incentive scheme.

"What are some of the measures that we have put in place to maintain the positive growth in gold deliveries to FGR? Maintain the forex retention of the LSM 80-100% on the incremental gold delivered to FGR. Maintain the current timeous payment to both large-scale and artisanal and small miners. FGR to

continue to lobby the government to continuously provide favourable policies to miners.

"FGR will continue funding the operations of the small-scale miners and continue finding solutions for progressive growth of ASM so that they can graduate to become Large Scale miners. Fidelity shall continue to work closely with the Ministry of Mines and Mining Development and other government departments to ensure that the gold leakages are minimised.

"In conclusion, the measures that I have highlighted were put in place to support an increase in gold production and shall be maintained and reviewed from time to time in order to achieve the 2023 vision of a Four Billion United States Dollar gold industry by 2023," Magaramombe said.

According to the Deputy Minister of Mines and Mining Development Dr Polite Kambamura, the government's positive policy intervention in the gold mining sector is bearing fruit. He added on saying that the government was eyeing more growth in the gold industry.

"Government positive policy intervention into the sector is bearing fruit. The gold sector was incentivised by the government through the Reserve Bank of Zimbabwe, this has seen an increase in gold deliveries to FGR. However, the sector has the potential to score higher," Dr Kambamura said.

FGR statistics also show that gold delivery to Fidelity in July increased by 4.9 per cent increase to 2963.9129 kgs from 2824.6174 kgs delivered in 2021 with the ASM deliveries increasing by 2.5 per cent increase to 1998.1277 kgs from 1950.3063 kgs during the comparable month of 2021 while large scale gold producers deliveries also increased by 10.5 per cent to 965.7852 kgs from 874.3111 kgs in 2021. Gold deliveries in June however decreased by 5.20227 per cent to 2 805 kgs from 2 959.0733 kgs delivered in June 2021, ASM deliveries however increased to 1 968.0192 from 1

833.4697 delivered in June 2021 with the large-scale deliveries decreasing significantly to 837.1151 from 1 125.6036 delivered in June of the previous year.

In May 2022 total deliveries to FGR increased by 79.5403 kgs per cent to 2994.7512 from 1668.0102 kgs delivered in May 2021, with small-scale miners accounting for 1 939.0712 kgs from 783.8105 kgs delivered in May the previous year while large scale miners delivered 1 055.6800 kgs from 884.1997 kgs delivered the previous year.

FGR figures show that in April 2022 gold deliveries increased by 3.71761 per cent to 1621.9712 kgs from 1563.8339 kgs in March while Large scale producers' deliveries decreased by 14.1343 per cent to 859.4400 kgs from 1000.9122 kgs produced in March.

The statistics show that overall deliveries to Fidelity in April decreased by 3.24925 per cent to 2481.4112 Kgs from 2564.7461 kgs delivered in March.

During the first quarter of 2022 gold deliveries jumped 92 per cent to 7.695 tonnes from 4.016 tonnes in the comparable period of 2021.

The March 2022 gold output spiked 39 per cent to 2.564 tonnes from 1.8 tonnes achieved during the comparable period following the 5 per cent mining incentives put in place by the central bank.

Of the 7.695 tonnes delivered during the first quarter of 2022, small-scale miners delivered 4.949 tonnes against 2.746 tonnes from large-scale miners.

Large-scale gold producers delivered 11,2 tonnes to Fidelity in 2021 whilst small-scale producers contributed 18,5 tonnes. The highest tonnage of gold was delivered in the fourth quarter when small-scale miners delivered a record 7,6 tonnes, whilst primary producers weighed in with 3,1 tonnes.



*A Mashonaland West Small-scale mine site*

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## 10

# Reasons why Zimbabwe's small-scale gold mining has been successful



**G**OLD is one of Zimbabwe's top sources of foreign currency earners. Over the previous few years, precious metal production in the nation of Southern Africa has been rising gradually. The country, for instance, produced around 27 tonnes of gold in 2021, more than two tonnes more than in 2020.

According to Fidelity Gold Refinery, the only authorised gold buyer in Zimbabwe, gold output increased by 19,5% in 2022 compared to the previous year.

The nation's gold industry generated 35,38 tonnes in total. Out of this amount, small-scale miners produced 24 tonnes of gold, which is twice more than large scale producers.

The success of small-scale miners can be attributed to a number of variables, including prompt payments, government assistance, a reduction in royalties, an increase in the number of gold buying agents and centres, good gold prices, capacity-building workshops, and 100% currency retention.

We go into greater detail about these below.

## Prompt payments

Since 2021, small-scale miners who have delivered their gold to Fidelity Printers

and Refiners (FPR) have received timely direct payments from the country's sole gold buyer. Small-scale miners are being encouraged to supply to the legal market since FPR is now paying rates that are competitive with the London Bullion Market. The action has motivated miners to raise output. Additionally, it has assisted in minimising the illegal export of gold by small-scale miners, which is thought to be worth US\$1.2 billion annually.

## Good relationships with different stakeholders

The success of small-scale producers was credited to the government's continuing backing, according to Wellington Takavarasha, chief executive officer of the Zimbabwe Miners Federation (ZMF), which is Zimbabwe's biggest mining body representing between 500 000 and 1,5 million artisanal and small-scale miners.

According to him, "the better delivery are largely related to enhanced government assistance for the mining industry as well as more coordination and communication amongst stakeholders on concerns surrounding small-scale mining activities."

ZMF, government departments and organizations like the Ministry of Mines

and Mining Development, the Environmental Management Agency (EMA), the Reserve Bank's gold mobilization team, and Fidelity Printers and Refiners are some examples of such stakeholders.

Takavarasha claimed that in contrast to the past, when organizations like EMA would take a combative stance toward small-scale miners regarding environmental issues, there has been improved coordination between industry participants and communication in the form of awareness campaigns by organizations like EMA and gold mobilization teams.

## Government support

Through gold milling incentives, the government has also helped the mining sector. In addition to the various FPR incentives,

*FPR gives small-scale miners a 100% forex retention after they deliver the gold to them is another contributing element*

Takavarasha said that small-scale miners also received assistance from the Ministry of Mines and Mining Development and organizations that deal with mining-related issues, such as EMA. To increase gold deliveries,

FPR is providing a financing facility to support both new and current operations. The government is also helping small-scale miners implement sustainable, secure, and ecologically responsible mining practices. The Mining Industry Lending Fund will get further funding, as per the 2023 National Budget, to help small-scale miners through loan programs for plant and equipment hire and mining establishment loans.

## Good gold prices

Since April 2022, gold prices have been rising and are currently at an all-time high, which is advantageous for the industry. As of January 25, 2023, the spot price of gold was unchanged at US\$1,936.39 per ounce. Miners are likewise motivated to expand output when prices are good.



### Capacity building workshops

Another reason why small-scale miners have been able to keep their gold deliveries above those of large-scale producers is because ZMF has provided capacity-building training on how to operate and manage a mine. As a result, miners now approach mining as a business.

### 100% forex retention

The fact that FPR gives small-scale miners a 100% forex retention after they deliver the gold to them is another contributing element to how small-scale miners have been able to maintain output above that of their large-scale counterparts. Therefore, miners are returning the favour by increasing their output of the yellow metal.

### Increase in gold-buying agents

The number of gold-buying agents has increased nationwide, and this has improved accountability and openness in the purchase of the yellow metal. Additionally, it has inspired miners to market their gold through recognized

channels.

### Increase in gold buying centres/ gold service centres

The number of gold-buying locations around the nation has also expanded, thanks to FPR. The ease with which miners can now sell their gold has improved gold deliveries. In the past, miners had to travel great distances to sell their gold to the closest gold-buying facility. This motivated miners to eventually sell their gold

*The number of gold-buying locations around the nation has also expanded, thanks to FPR.*

through illicit means. In the 2023 National Budget, Finance Minister Mthuli Ncube stated that the government will support the establishment of gold service centres as part of the effort to encourage the

formalization of small-scale and artisanal miners' operations, to have five fully established centres by the end of 2023. To make the processing and sale of gold easier, the centres will be placed in regions where small-scale miners are active.

### Reduction of royalty

The royalty rate for ASM and large-scale miners in the gold industry was set at 7% prior to 2014. The 2014 National Budget

Statement reduced the royalty rate for ASM from 7% to 3% for gold output not exceeding half a kilogram per month as an incentive for selling gold on the official market and this change took effect on January 1, 2014.

With effect from September 1, 2015, the ASM gold royalty rate was further reduced from 3% to 1%. Government officials have been praising the impact of a lower ASM gold royalty rate as a key factor in the growth of gold delivery on the legal market. With effect from September 2019, the ASM gold royalty rate increased from 1% to 2% in a policy U-turn.

The government cut the royalty charge back to 1% from 2% in 2021 after noticing a dramatic fall in ASM gold deliveries.

### Meetings between ZMF and parent ministry

Takavarasha claimed that during weekly meetings between ZMF and the Ministry of Mines and Mining Development, the government had immediately addressed some of the issues the miners were encountering. This has substantially improved the simplicity of conducting business for small-scale miners.



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# Zim unveil opportunities to invest in mineral processing



**T**he government of Zimbabwe through the Ministry of Mines and Mining Development has unveiled opportunities for investors to invest in value addition and beneficiation of minerals by restricting the export of all ores and under-processed minerals.

Rudairo Mapuranga

Through the Base Minerals Export Control (Unbeneficiated Base Mineral Ores) Order, 2023, contained in Statutory Instrument 5 of 2023 and signed by the Minister of Mines and Mining Development Hon Winston Chitando, the government stated that no mineral can be mined or quarried that can be exported until it has reached set-down levels of processing.



*Hon Winston Chitando*

According to the Mines and Minerals Act, minerals are effectively anything of value that can be mined or quarried, and base minerals are everything except the precious metals of gold, silver and the platinum group, diamonds and other precious stones, and mineral oils and gases.

The new order defines Base minerals as everything else not covered by other laws and includes coal and coke as well as the non-precious metals commonly regarded as base metals, plus anything else that can be mined or quarried and is declared a

base mineral.

The objectives of the bans under all Acts of any ore are designed to encourage the maximum possible processing within Zimbabwe, adding value, with this processing added value in many cases worth a lot more than the ore being processed. This maximises the value of the export, creates processing jobs in Zimbabwe, and builds up the industrial investment and skills base.

The President of Zimbabwe HE Emmerson Dambudzo Mnangagwa has on many occasions praised the decision to restrict the export of unprocessed minerals saying that it will encourage the creation of higher-value downstream processing jobs in the domestic market.

Export restrictions of raw materials are also used to meet other objectives; for example, to generate revenue for the government, to control the export of illegally mined products, to enhance environmental protection, or to offset exchange rate impacts caused by exports of several commodities.

According to the Minerals Marketing Corporation of Zimbabwe (MMCZ) General Manager Mr Tongai Muzenda, the government is open for business to companies that want to establish value addition and beneficiation facilities as this will be of great significance towards the achievement of the government's 2030 vision where the country expects to achieve an upper middle-income economy.

"MMCZ's role in value addition is in encouraging producers to value add their products. The MMCZ is there to maximize

value, we are therefore calling for local and foreign companies to consider investing in value addition and beneficiation as it is one of the pillars for the achievement of the President's 2030 vision.

"It's a very lucrative opportunity for companies that appreciate minerals coming from Zimbabwe, for example, we have the best chrome ore in the world. This is the time for the companies to come and probably enjoy our high-grade minerals," Muzenda said.

Institute of Zimbabwe Foundries (ZIF) president, Itai Zaba, said the Government's bold stance was crucial for the metal foundry industry, which was facing challenges in securing inputs at affordable rates.

As such, Mr Zaba said the ban will promote beneficiation of all ores, which will promote industrial growth, employment creation and technology transfer to the country.

He said the ban will not benefit the foundry family alone but downstream suppliers.

"Beneficiation will promote industrial growth via setting up of new plants and this will bring about much-needed employment and also bring about technology transfer to Zimbabwe.

"Also, the value chain cannot be closed in at the foundry alone, it goes far to various suppliers in services, chemical, gas, fuel, power, construction, banking and Zimra who will find the opportunity to do business in the foundry and chrome beneficiation sectors.

"So, one should never be blinkered like a horse to only see the foundry industry in this equation, it's a big net of benefits to the nation," Zaba said.



*Itai Zaba*

ZIF COO Mr Dosman Mangisi hailed the government's stance on the ban on exports of base metals which are important in the iron and steel manufacturing industry. He said that the ban has come with opportunities for local investors to move around to feed the foundry industry raw materials like ferromanganese which the country has been exporting.

"The foundry opportunities that exist are making or manufacturing of raw materials, currently we don't have ferromanganese, we were importing it from Zambia yet we have it raw here. The ban will boost business, in terms of creating companies that can produce for example ferromanganese. We can also produce cathodes. The foundry sector is a billion-dollar industry, and the ban by the government is a step towards unveiling all the opportunities," Mangisi said.

Mining consultant Mr Nyasha Magadhi said that the ban on raw minerals exports has created opportunities for local investors as well as foreign investors who can start by establishing mineral processing plants similar to what the government has been doing in the gold industry. He said all over the country, there are many gold processing plants, and the same should follow for minerals

like lithium in producing concentrates.

"The government by banning the export of raw minerals has created opportunities for both local and foreign investors in the processing industry. Now we are going to encourage investors to put their money into processing minerals starting with lithium. We want the government to also bring to the lithium sector lithium service centres where miners will be delivering their raw lithium for processing.



"The ban will benefit youth through creating more jobs and downstream activities for communities," Magadhi said.

The ban has seen a local mineral processing company Ionosphere Investments owned by Nyasha Chido begin the production of lithium concentrates and it will be producing approximately 36 000 of concentrates annually.

Chido revealed plans to almost double Ionosphere's targeted annual output to about 70 000 tonnes of lithium concentrates and this would place the company among the country's top four producers.

"We see all the demand is there significantly unmet demand for battery-grade lithium in the next three years"

"Whoever is producing lithium in the coming three years is going to make abnormally high margins," Chido said.

Lithium prices have risen tenfold to \$75,000 a tonne since the beginning of 2021. A tight market has sparked a rush by carmakers to secure supplies of a commodity that, along with cobalt and nickel, is vital for electric vehicles.

Chido revealed that Ionosphere is one of the new battery metals companies to do value addition and it supported the move by the government to outlaw raw Lithium exports.

"Ionosphere investments is uniquely positioned as one of really only new battery metals companies to do value addition and is in support of the government's decision to ban the export of raw lithium.



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# Reliable last-mile chemical distribution platform in Africa



**E**TG Inputs Holdco Limited, (EIHL), a subsidiary of ETG Group (ETG), a global conglomerate with a presence across multiple industries, acquired Curechem, an independent industrial, mining, and agrochemicals company. ETG and Curechem entered a strategic partnership in 2022, with the objective to grow the chemical business in existing and new geographies, leveraging ETG's supply chain and distribution strengths across Africa. Rebranding to become ETG Curechem, its strategic objective is to grow the chemical business in the mining and industrial sectors, further diversifying ETG's offering, and playing an important role in establishing a reliable last-mile chemical distribution platform in Africa.

"Curechem's vision is to become a market leader in chemical distribution by the year 2025. With this acquisition, the vision is sure to become a reality perhaps before 2025. ETG and Curechem complement so well, it is in fact, a perfect fit", said Mr. Anup Chand, Group Managing Director of Curechem.

Manoj Shewkani, Regional Head for EIHL- East Africa and Curechem, said: "Venturing into the industrial and mining chemical segment, will further diversify EIHL's offering, strengthening our position in becoming an industry leader in Africa. ETG Curechem is excited to work towards

a mutual goal of creating a positive impact."

**Explosives** - ETG Curechem supplies Ammonium Nitrate leveraging our strength in fertilizer business, Shock Tubes, Detonators, Emulsions, Cartridges to the gold, platinum, lithium, chrome and quarry mining sector. We aim for safety of our customers by supplying quality product and technical expertise, with the overriding objective of reducing and, if possible, eliminating fatal accidents and serious injuries that could be attributed to blast initiation systems in mines.

**Gold** - Africa is endowed with large deposits of gold and as ETG Curechem we are strategically placed in all major gold-producing countries and supply all the gold processing chemicals. We have partnerships for the exclusive distribution of Sodium Cyanide, Activated Carbon, Acids, Lime, and various other chemicals used in processing gold. Leveraging on our parent company's (ETC Group (ETG)) we are now positioned to supply any mine in Africa.



**Copper** - As ETG Curechem, we supply the major copper mining companies with

chemicals for processing copper within the Copperbelt Region (DRC and Zambia). With several notable players already operating within the country and increasing global copper demand, it's safe to say that Zambia and DRC are poised to become strategic players in helping the global economy meet its growing metal needs.

**Lithium** - a booming industry for Zimbabwe boasting one of the largest resources in the world, due to our network and resources we have the capacity to supply mining chemicals to this critical sector thereby contributing to the US\$12 billion mining industry in Zimbabwe.

**Safety** - as an ISO-certified organisation we focus on operating in a sustainable manner and focus on providing chemical handling skills training, disposal of hazardous waste, and emergency preparedness to all our customers and employees. We conduct training for all our clients including ASSM, thereby ensuring a sustainable and responsible supply chain.

We look forward to engaging with all stakeholders in the mining sector, to grow our business, and enhance customer efficiency and satisfaction and possible partnerships that are mutually beneficial.





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# 2022

## Key mining projects and upgrades

**I**n 2021, the mining industry attained USD5.46 billion in exports against a targeted projection of USD8 billion during that period. The mining sector remains well on course to generate USD12 billion in revenue by the year 2023 thereby contributing significantly towards the attainment of the national vision.

The main minerals that are going to lead the growth of the mining sector include gold, platinum group metals (PGMs), ferrochrome, steel, nickel, diamonds, lithium, coal and hydrocarbons. Under National Development Strategy (NDSI) implementation, beneficiation and Value Addition of our economic minerals will ultimately feed into the attainment of Vision 2030 of Zimbabwe becoming an Upper Middle-Income Economy by the year 2030.

Zimbabwe is prioritizing enhanced investments in exploration, opening of new mines, beneficiation and value addition of minerals; as well as expansion of projects subject to various commercial and economic models. His Excellency has commissioned a number of mining projects across various mineral subsectors

such as gold, diamonds, Platinum Group Metals (PGMs), Coal and lithium among others. The Mining Sector continues to record positive growth underpinned by a number of programmes that include increased exploration, resuscitation of closed mines, the opening of new mines, expansion of existing mining projects and mineral beneficiation and value addition.

Main minerals that are going to lead the growth of the mining sector include gold, platinum group metals (PGMs), coal ferrochrome, steel, nickel, diamonds, lithium and hydrocarbons

The following are Key mining projects and upgrades made since the inception of President Emmerson Mnangagwa's administration.

**GOLD: Caledonia Mining Corporation Plc/ Blanket Mine (Shaft Expansion), Gwanda Matabeleland South**



The government of Zimbabwe signed a Memorandum of Understanding with Caledonia Mining Corporation Plc on 5 October 2020 for the expansion of Blanket Mine. The project is now under implementation.

Blanket Mine is increasing production through the Central Shaft Expansion Project.

The Central Shaft project commenced in 2015 with the objectives to increase production to 80,000 ounces of gold per annum, reduce operating costs and allow for further exploration to extend the life of mine beyond 2024.

The Central Shaft is one of the deepest shafts in Zimbabwe, with a depth of 1,200 metres from the surface.

The total investment of the project is USD67 million and the project employs a total of 1,979 people in Zimbabwe.

Caledonia Mine has also constructed a 12MW Solar Plant at Blanket, at a cost of approximately USD14 million.

*Continued after the next page>>*

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### RioZim Cam and Motor mine (expansion project) Kadoma, Mashonaland West



- RioZim Cam and Motor Mine Biox Plant was officially commissioned by His Excellency, the President of the Republic of Zimbabwe, Cde. Dr. E. D. Mnangagwa on 14 April 2022.
- The project will result in the creation of additional direct employment of about 120 people.
- The gold production will reach 140 kilogrammes per month, during the first phase of the project, and will peak at 200 kilograms per month, after Phase 2 is implemented.

### ZIMCN RADNOR MINE (Makaha, Mashonaland East)



- A total of USD 35 million was invested into the mine.
- 200 workers engaged on a full-time basis comprising 60 Chinese engineers and 140 local Zimbabweans. Of the 140 local Zimbabweans, 41 are residents of the local project hosting area of Makaha and its surrounding areas of Mudzi, Mutoko, Murehwa and Nyanga North.
- Acquisition, installation and turning on of the country's single largest gold ore crushing unit at a processing capacity of 1000 tons per hour.
- Construction and operationalization of the country's largest gold recovery heap leaching project hosted by a single mining entity. In the past 15 months period, the mine has developed heap leaching pads covering a combined floor base of 15 hectares. In the same period, 1.5 million tons of ore has been extracted, crushed and loaded onto pads.
- Development of a major 200 metres deep 7m by 7m inclined tunnel shaft to extract the deep underlying high-grade

sulphide ores. The tunnel is currently being developed to reach a 1km extent for massive ore extraction at rates of 100 tonnes per hour.

- Corporate Social Responsibility plan has entailed road rehabilitation, borehole drilling, local schools' buildings renovations and mobilization of Netone to install a mobile network booster for the surrounding community.

### PLATINUM GROUP OF METALS (PGMs) Unki Mine (Pvt) Ltd (Expansion Project) Shurugwi, Midlands



- ZIMPLATS signed a Memorandum of Understanding with Government of Zimbabwe in 2021 that will see the company invest USD1.8 billion to expand its operation by the year 2025.
- ZIMPLATS signed a memorandum of understanding with the Government of Zimbabwe in 2021 that will see the company invest USD 1.8 billion to expand its operation by the year 2025.
  - These projects include new mine development, additional concentrator, PGMs smelter expansion, PGM Base Metal Refinery (BMR) plant, sulphuric acid plant as well as the 110 MW Solar power plant.

### MIMOSA MINING COMPANY, ZVISHAVANE

- The Concentrator Optimization at Mimosa Mining Company is nearing completion and the commissioning of the concentrator is scheduled for February 2023.
- The concentrator optimization project will result in an increase of 11,552 4E ounces PGMs per year.
- The project will generate USD27 million per annum with a workforce of about 33 people.

### CHROME, FERROCHROME AND STEEL Afrochine Smelting, Selous



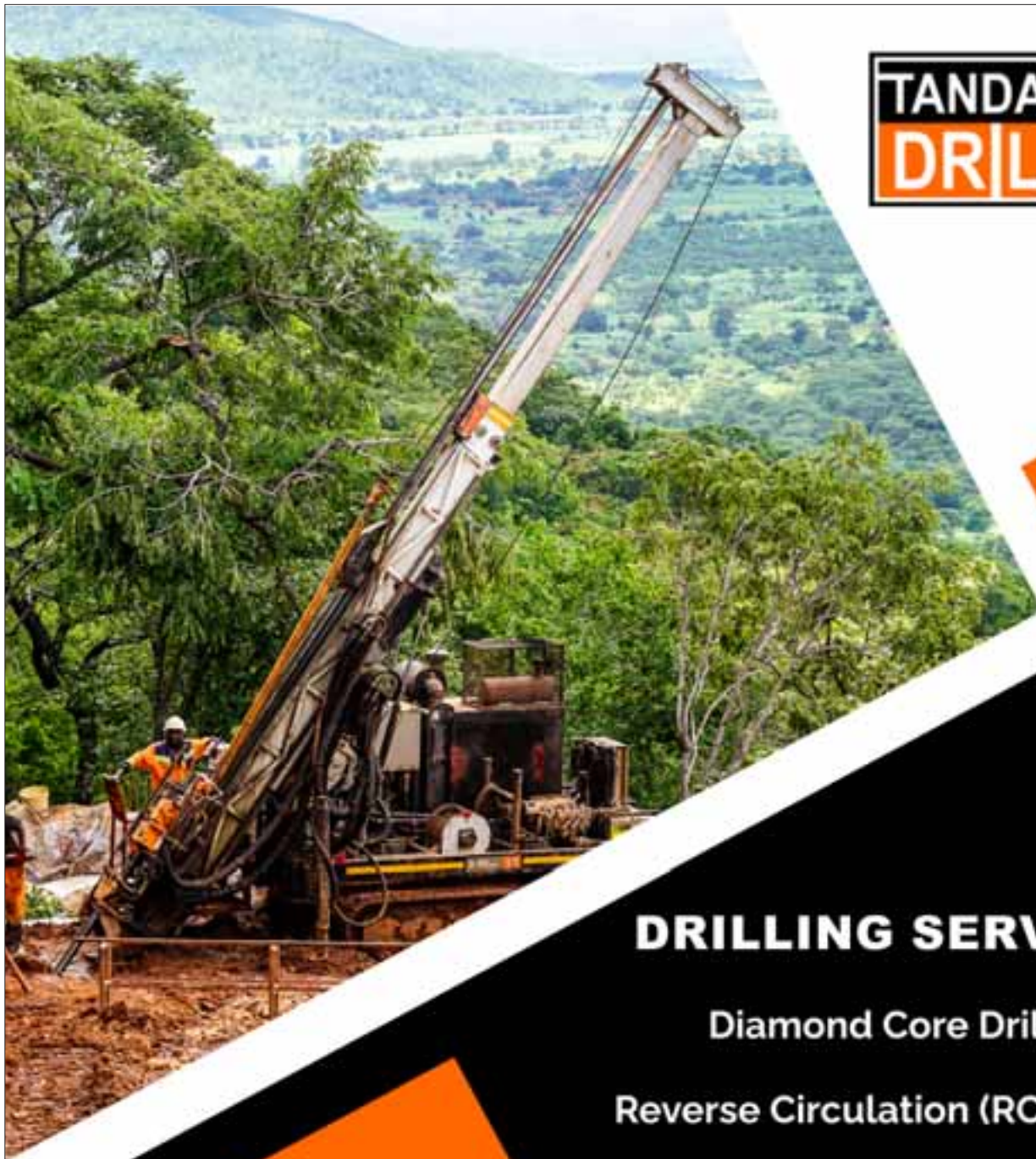
- Operationalization of 2 × 12.5 MVA Furnaces in addition to 3 Chrome Smelters already operating to produce 600 000 tons per annum of ferrochrome was done in June 2019. Afrochine now has a total of 5 operational smelters.
- The furnaces are ready for commissioning by His Excellency.
- They are working on increasing furnace capacity to achieve 500,000 tonnes by 2023 ramping up to achieve 1,000,000 tonnes by 2025. They are also setting up 2 smelters in Chivi.

### DINSON IRON AND STEEL COMPANY (PVT) LTD (TSHINGSHAN), CARBON STEEL PLANT (NEW PROJECT)



- The steel plant will produce 1.2 million tons of carbon steel per annum and will generate around USD 1.2 billion per annum.
- The Capital Investment for Phase 1 of the project is about USD1 Billion and is expected to have an annual turnover of over USD600 Million per annum.
  - The project is set to employ over 2000 employees during the first phase. At full throttle, the Steel company itself is expected to employ more than 10 000 workers directly while it will create employment for millions of Zimbabweans indirectly through the upstream and downstream industries.
  - The original MoU signed between Government and Tsingshan Holdings Group was signed in June 2018 after His Excellency had met its Chairman in April 2018.
  - The original MoU saw the setting up of the Dinson Colliery and Manhize Iron Ore and Value addition park.
  - On the 29th of November 2022, The President of the Republic of Zimbabwe, His Excellency, Cde. Dr. E. D. Mnangagwa presided over the signing of the addendum to the Memorandum of Understanding between Government of Zimbabwe and Tsingshan Holdings.
  - The addendum to the Memorandum of Understanding concerns the following:

*Continued after the next page>>*



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## 2022 KEY MINING PROJECTS AND UPGRADES

- i. Expansion of two more furnaces in Afrochine Smelting (Private) Limited;
- ii. Setting up of 350,000 coke production capacity at Dinson Colliery (Private) Limited;
- iii. Establishment of a carbon steel plant with its first phase of 600,000tons at Dinson Iron and Steel Company (Private) Limited;
- iv. Setting up a cement manufacturing plant with a capacity of (one) 1 million tonnes per year;
- v. Setting up a lithium processing plant with a capacity to produce (two) 2 million tonnes per year of lithium concentrate;
- vi. Refurbishment and construction of a 1000km long railway line system in the ROZ to provide a dedicated, reliable, uninterrupted and efficient railway system to be able to ferry our products for both local and exports-imports routes;
- vii. Construction of a 1000Mw power plant to ensure energy security.

### DIAMOND

#### **RZM Murowa Diamonds Greenfields Diamond Plant Construction, Murowa, Midlands**



- The construction of the RZM Murowa 500 TPH Greenfields Diamond Plant Project is now complete, with the project now awaiting commissioning. The expansion is expected to increase output from 190 000 tons of ore per month to 500 000 tons per month.
- The project will create employment for 679 locals.
- The project will increase diamond production in Zimbabwe, foreign currency generation and development of the local communities of Zvishavane.
- The expansion of RZM Murowa Diamonds is a success story to the President's call for investors to invest in the geologically rich nation. RZM Murowa Diamonds is a key driver in achieving the National Development Strategy 1 (NDS1) and Vision 2030.
- RZM Murowa Diamonds is expected to make a significant contribution towards achieving a USD12 Billion Mining sector by 2023 and eventually driving the economy

to become an Upper Middle-Income Economy by 2030.

### LITHIUM

#### **Sinomine Bikita Minerals, Masvingo**



- Sinomine acquired an effective shareholding in Bikita Minerals (Private) Limited ("Bikita") in February 2022 through the purchase equity in Bikita held by external shareholders.
- Sinomine has been investing in Zimbabwe for over 15 years, commencing with exploration, contract mining, and investing in the lithium businesses from the Arcadia Resources project to the acquisition of Bikita Minerals in February 2022. Sinomine sold its minority shareholding in Arcadia in 2021.
- Following the takeover by Sinomine, Bikita's strategic development plan is as follows:
  - a. Based on the exploration advantages of Sinomine, they have already implemented resource exploration of the mining area, have found more reserves of Bikita minerals, providing further technical support and resource guarantees for the development of the Mine to the next stage.
  - b. To invest USD50 million dollars expanding the petalite plant to increase the current capacity and production. Bikita currently produces petalite and intends to increase its production and export.
  - c. To invest USD150 million dollars to set up a new spodumene production line and to develop the Spodumene project. Spodumene contains chemical grade lithium required for batteries. It requires several phases of processing before it can be used to make batteries.
  - d. To invest USD20 million dollars to set up a new 110km power line from Tokow station via Masvingo to Bikita Mine, which will improve the Nation Grid and benefit of the whole of Masvingo Province for its people.

#### **SABI STAR MINE, BUHERA**

- The construction of a Lithium Processing Plant is underway.
- The project is scheduled for completion in February 2023.
- The company plans to set up a battery-



grade Lithium plant in Zimbabwe with an envisaged investment of USD 250 Million. The plant is expected to be the first and the largest of its kind in Africa.

- Regarding Community and Social Responsibility (CSR), the company intends to build a local clinic. There is also scope for drilling boreholes for the local community to alleviate challenges related to water for domestic and project purposes.
- Max Mind (Pvt) Ltd intends to invest up to USD8 Million in the first phase of the project which will result in the export of lithium and tantalite concentrates and they have so far already invested USD 5 Million.
- The annual turnover for the project will be USD600 million per annum with a workforce of 400 people directly and indirectly.

#### **MINES TO ENERGY PARK, MAPINGA**



- The project entails the establishment of a Mines to Energy Park in Mapinga, Mashonaland West.
- The park will be comprised of the following:
  - i. Two (2) three hundred megawatt (300MW) power stations;
  - ii. A coking plant with a capacity of one million and two hundred thousand tonnes (1,200,000t) of coke per annum at an estimated cost of two hundred million United States dollars (USD200,000,000.00);
  - iii. A lithium salt plant at an estimated cost of four hundred and fifty million United States dollars (USD450,000,000.00) with a capacity to produce over thirty thousand tonnes (30,000t) of lithium hydroxide and the capacity to expand to over one hundred and thirty thousand tonnes (130,000t) of lithium carbonate and/or lithium hydroxide per annum;

*Continued after the next page>>*





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## 2022 KEY MINING PROJECTS AND UPGRADES

iv. A graphite plant at an estimated cost of one hundred and eighty million United States dollars (USD180,000,000.00) for Phase I with a capacity to produce seventy-five thousand tonnes (75,000t) of ninety-five per cent (95%) purity graphite per annum, and a further Phase II for battery grade product;

v. A nickel sulphate plant to produce one hundred and fifty thousand tonnes (150,000t) of nickel sulphate, six hundred thousand tonnes (600,000t) of magnesium oxide, one hundred and fifty thousand tonnes (150,000t) of sodium hydroxide and two hundred thousand tonnes (200,000t) of iron concentrate per annum at an estimated cost of one billion United States dollars (USD1,000,000,000.00);

vi. A nickel-chromium alloy smelter to produce three hundred thousand tonnes (300,000t) of nickel-chromium alloy per annum at an estimated cost of five hundred million United States dollars (USD500,000,000.00).

### COPPER

#### Grand Sanyuan Copper Resources Zimbabwe



*President Mnangagwa officially commissions the-Grand Sanyuan Copper Resources Zimbabwe*

- The construction of the Copper Processing Plant is now complete and the smelter is operational.
- The establishment of the smelter will be an important step towards full copper value addition as per the Greater Chinhoyi Copper Development program.
- The production output of copper bullion is expected to be 450 tons per month.
- The project will generate USD14.4 million per annum with a workforce of about 94 people.

### ENERGY MINERAL PROJECTS (COAL, COKE, OIL AND GAS)

Dinson Colliery Plant For Coking Coal Production, Hwange Mat North.

· The construction of the Dinson Colliery Phase 2 Coke Oven Battery is now complete with the installation of equipment underway.

· Phase 2 Coke Oven Battery is scheduled for completion by Q1 2023.

· Phase 2 of the project will have a capacity of 180,000 tonnes per annum, generate revenue of USD54 million per annum and create employment for 500 locals.



*Blanket Mine solar plant*



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# Lithium

## Exploration and mining on the rise in Zimbabwe

The popularity and rise of energy minerals due to the world's shift towards clean energy has presented many opportunities to the country's mineral landscape with lithium becoming the most sort after mineral in the country.

Keith Sungiso

It is not a secret that Lithium has attracted world recognition as a significant mineral playing a substantial role in electric cars and other clean tech gadgets, Zimbabwe has not been spared with this development as prospecting for lithium in the country has increased significantly.

According to the Deputy Minister of Mines and Mining Development Hon Dr Polite Kambamira although most lithium project in Zimbabwe are at exploration stage, there has been a lot of prospecting and pegging of lithium mining claims in Zimbabwe.

"Most projects are still in the exploration stage. However, a few lithium projects are on mine development. We also have noted a lot of pegging and prospecting for lithium," Dr Kambamira said.

The government through the Ministry of Mines and Mining Development

Permanent Secretary Mr Pfungwa Kunaka has temporarily put on hold the prospecting and pegging of lithium mining claims to ensure that the mineral be of strategic to economic growth and development.

It has been noted that lithium Mining in Zimbabwe is on the rise with several projects in the exploration phase forecasted to kick-start production in 2023, among the projects is Arcadia Lithium Project which is expected to be Africa's biggest lithium producer.

Zimbabwe has the largest lithium reserves in Africa and the fifth-largest deposits worldwide. It has the highest number of Lithium projects under exploration on the continent. Below is a comprehensive list of current lithium mines from the exploration phase to full-scale operations in no particular order.

### Bikita Minerals

Bikita Lithium Mine is Zimbabwe's biggest lithium producer and is the home to the world's largest-known deposit of the metal at around 11 million tonnes.

Bikita Minerals has been an active mining site for around 100 years.

For over 50 years, the mining and extraction of lithium minerals has been at the centre of Bikita Minerals' activities. Today, Bikita Minerals is the World's foremost supplier of the lithium mineral Petalite.

China Sinomine Resource Group, which acquired Bikita Minerals will invest US\$200 million to build a plant and expand its existing mining operations.

### Arcadia lithium mine

Zimbabwe also has upcoming projects with the Arcadia lithium mine expected to start delivering lithium-containing minerals spodumene and petalite next year.

It is anticipated that Arcadia will be producing an average of 212,000 tonnes (t) of 6% spodumene concentrate, 216,000t of petalite concentrate, and 188,000 pounds (lbs) of tantalum per annum from Arcadia. The project is estimated to have a mine life of 12 years.

The project hosts greenstone rock units of Arcturus formation, a member of the Harare Greenstone Belt (HGB). It is housed within a series of steeper, petalite-spodumene bearing pegmatites, with an average thickness of 15m, in the HGB. The pegmatites extend up to 2.5km along strike.



The mineralisation at the Arcadia deposit is predominantly made up of petalite and spodumene, while the secondary minerals are eucryptite, bikitaite, lepidolite, and tantalite Huayou, one of the world's major producers of cobalt, last year completed a 422-million-U.S.-dollar purchase of the hard-rock lithium mine from Australia-listed Prospect Resources.

### Sabi Star Lithium Mine

Shenzhen-listed Chengxin Lithium Group last year also acquired a 51 per cent interest stake in Sabi Star Lithium Mine in eastern Zimbabwe for 77 million U.S. dollars.

The company, listed on the Shenzhen stock exchange, spent US\$76.5 million last September to buy 51% of MaxMind, which held claims.

Sabi Star Mine is expected to produce 1 million tonnes of raw ore and is currently constructing processing infrastructure. The recovery of the lithium will be via the flotation process which will include gravity separation circuits to also recover tantalite. At full operational capacity, the 1 million tonnes of ore will translate to 300 000 tonnes of lithium concentrate and 300 tonnes of tantalite-niobium per year.

The construction of the processing infrastructure will be in the region of US\$130 million. Sabi Star Mine will initially export lithium concentrates to China.

### Mirrorplex Lithium project

Also promising is the Shamva-based MIRRORPLEX (Pvt) Limited's lithium project which is currently in the exploration phase.

The project which is postured to become Zimbabwe's biggest hard rock lithium resource has the potential to grow into a world-class lithium mine with results from 240 Rock Chip samples taken from the exposed Bonnyvale pegmatite body at the Shamva Lithium Project providing high-grade lithium assay results up to 3.13% Li<sub>2</sub>O and surface sampling at the Loch Ness prospect revealing two more pegmatites containing high Li<sub>2</sub>O grades up to 4.82% Li<sub>2</sub>O.

Speculatively sitting on over 6 million tonnes of lithium highest grade ore, Mirrorplex is working on Stage two drilling consisting of reverse circulation to confirm mineralisation beneath Lochness North, South Bonny Vale and Hereford East

and West as well as testing for extensions of mineralisation.

### Zulu Lithium and Tantalum Project

Zulu Lithium and Tantalum Project is possibly the largest undeveloped lithium-bearing pegmatite in Zimbabwe, located 80 kilometres from Bulawayo.

In early August, Premier received US\$18.1 million from Suzhou TA&A Ultra Clean Technology, as part of the marketing and prepayment agreement, which the two parties entered into in June this year.

Under the agreement, clean technology developer Suzhou TA&A agreed to purchase, in advance, spodumene concentrate six (SC6) worth US\$34.6 million from Premier to enable the construction and commissioning of a large-scale pilot plant at the Zulu lithium project.

### Step Aside Lithium project

Prospect Resources currently owns a potential high-grade lithium deposit located approximately 8km north of the Arcadia Lithium project, the Step Aside Lithium project.

The prospectivity of this area is confirmed by positive historical regional stream and soil sample geochemistry results. The potential is centred on four mineralised pegmatites that are mapped within a meta-dolerite host rock. These LCT mineralised pegmatites run parallel to each other in a north-south orientation and have dip angles of approximately 40-45° to the west.

An early-stage exploration program is underway at Step Aside, with rock chip sampling completed and trenching and drilling activities set to commence in Q3 2022. This work is targeted to determine the potential extent by delineating the thickness and strike length of the sub-surface pegmatite.

### Kamativi Lithium project

Following an assignment agreement (Deed of Assignment) Galileo Resources entered with BC Ventures and Cordoba Investments Limited in January this year, the resources firm has the option to acquire a 51 per cent interest in BC Ventures by spending US\$1.5 million on exploration. BC Ventures own the lithium project and two gold licences near Bulawayo through its wholly-owned

Zimbabwe subsidiary, Sinamatela Investments (Private) Limited.

The Kamativi Lithium Project comprises EPO 1782, covering 520 km<sup>2</sup>, and lies on the Kamativi Belt directly adjacent to, and along strike from the historic Kamativi tin-tantalum mine which operated from 1936 to 1994. The Kamativi Mine produced 37,000 tonnes of tin and 3,000 tonnes of tantalum ore from pegmatites, and in 2018 Chimata Gold Corp (Zimbabwe Lithium Company) announced a new JORC (2012) compliant Indicated Mineral Resource of 26Mt @ 0.58% Li<sub>2</sub>O within the Kamativi mine tailings, confirming that the mine contained significant quantities of lithium.

In June 2022, Galileo announced that it has started exploration works at the Kamativi lithium project.

### Kamativi Lithium Mine

Kamativi Mining Company (KMC) is rapidly spearheading its exploration drive to transform the former tin mine into one of the biggest spodumene and Petalite ore body in Zimbabwe.

Between September 2021 and March 2022, Phase-one drilling commenced with 38 holes being drilled to the depth of 2140m. Phase-one drilling focuses on open-cast areas with shallow holes for Open Cast Mining.

Between April 2022 - June 2022, Phase-two drilling commenced and KMC managed to drill 28 holes of 5000m. The drilling was for underground mining and Mineral Processing research is still underway.

Phase-two detailed drilling of 100 holes of around 15000m is being carried out with detailed exploration for underground mining and resource report and feasibility study to be expected after drilling is completed.

To date, 4900m have been drilled from late September 2022 using the 8 rigs on site. Exploration is going to be upscaled by an additional 4 rigs which are expected to be on-site by early November 2022 (bringing the total number of rigs on-site to more than 12 rigs) in mid-November.

Preliminary sample results have shown encouraging results for the mine hosting high-grade lithium spodumene, petalite with the mine having the potential to become one of the biggest lithium producers in Africa.

# 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.



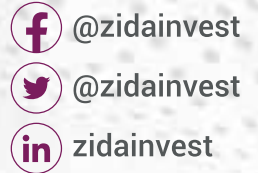
# Minerals and areas of verified deposits in Zimbabwe

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, Bulilimangwe, 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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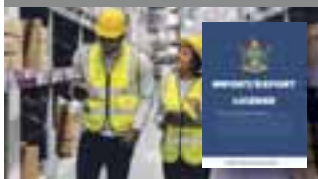
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