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ISSUE
77
2025

Minining

Z I M B A B W E



Interview:

Minister of Mines and Mining Development
Hon Winston Chitando

Zimbabwe

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Bulawayo Office

ZITF Site A7-09, Bulawayo,
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Contact Us

Head Office

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Our Branches

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Face the Investor

INTERVIEW: MINISTER OF MINES AND MINING DEVELOPMENT, ZIMBABWE

What incentives does Zimbabwe offer to attract foreign investment in
Critical Minerals?

What
Assures
investors of tenure security in
Zimbabwe?

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**Hon
Winston Chitando**



Mining

ZIMBABWE

WRITERS/ JOURNALISTS

Rudairo Mapuranga
Ryan Chigoche
Dr James Tsabora

SALES & ADVERTISING

Kelvin Sungiso
kelvin@miningzimbabwe.com
Cell/Whatsapp: 0775523000

PUBLISHER

Timelison Media (Zimbabwe),
Sungie Media (South Africa)

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Publisher contacts

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Zimbabwe: The Next Mining Powerhouse Ready for Global Investors!



THE CLEAR PERSPECTIVE

As we launch this special issue focused on Investing in Africa Mining Indaba, we invite global investors to take a closer look at Zimbabwe, a nation rich in resources and poised for a mining revolution. Zimbabwe stands as one of Africa's most resource-endowed nations, offering opportunities that rival some of the top mining destinations globally.

With over 40 valuable minerals, including gold, diamonds, platinum group metals (PGMs), and lithium, Zimbabwe is not only rich in mineral wealth but also strategically positioned to supply critical minerals essential for today's industries, from electric vehicle batteries to clean energy technologies. The country's mineral wealth is complemented by a robust mining infrastructure, a government dedicated to fostering investment, and a mining sector ready for growth.

We have highlighted key mining projects across Zimbabwe, from massive operations like Karo Platinum and ZCDC's diamond initiatives to lithium mines like Arcadia and Bikita, positioning Zimbabwe as a central player in the global energy transition. These projects demonstrate the scale, ambition, and readiness of Zimbabwe's mining sector to welcome new partnerships and investors.

Despite global challenges, Zimbabwe's mining

industry remains resilient, continuing to push forward with expansion and innovation. The country's mining policies, which prioritize joint ventures and local beneficiation, ensure that investors can work closely with the government and local players to build sustainable, mutually beneficial mining ventures.

This issue is filled with insights, updates, and opportunities in Zimbabwe's mining sector, from verified mineral deposits to ambitious ongoing projects. Investors are not just invited to observe but to participate in the nation's next mining boom. Zimbabwe offers a unique opportunity where rich mineral resources, a supportive government, and an eager workforce converge to unlock untapped potential.

Now is the time to invest in Zimbabwe, a country ripe for growth, with opportunities spanning the entire value chain—from exploration to extraction and processing. As global demand for critical minerals continues to rise, Zimbabwe stands ready to be a key supplier and partner in your investment journey.

We look forward to seeing you explore these opportunities in Zimbabwe, where the future of mining awaits.

Keith Lungiso

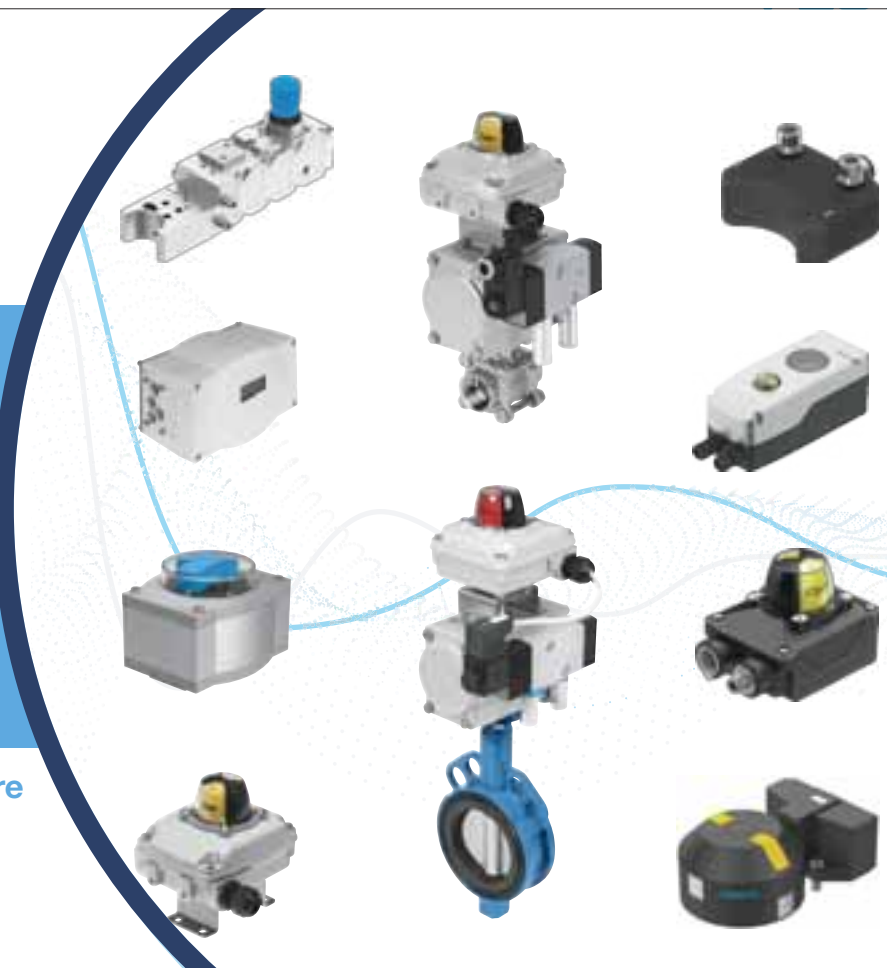


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Intrachem: Leaders in Zimbabwe's Explosives Industry

Founded in 1990, Intrachem is a proudly Zimbabwean company dedicated to the safe manufacture, supply, and application of explosives and explosives accessories, primarily serving the mining, civil, and construction sectors.

With nearly thirty-five years of experience, Intrachem possesses an intricate and unparalleled understanding of local mining requirements.

Intrachem aims to strengthen its position as the leading explosives supplier in Zimbabwe by prioritizing safety, quality and reliability. Intrachem's commitment to innovation ensures that it provides exceptional value to its customer base through safe and reliable supply and application of high-quality explosives and related accessories tailored to our customer needs. While delivering quantifiable value to our customers, our mission is to improve the world we live in through the safe and responsible use of explosives.

Intrachem offers a comprehensive range of products, catering to all scales of the mining industry, with technical services including cutting edge equipment, highly skilled technicians and innovative blast technologies ensuring that we optimize safety, efficiency and quality in operations.

Understanding the dynamic socio-economic environment and trends in Zimbabwe's mining sector, Intrachem emphasizes the importance of a strategic approach to human resource management. The company invests in key team development

programs to ensure service quality and adherence to industry standards. At Intrachem, the power of family is leveraged to build a cohesive and respectful workplace culture where every team member is valued.

INTRACHEM

offers a comprehensive range of products, catering to all scales of the mining industry, with technical services including **cutting edge equipment, highly skilled technicians** and innovative blast technologies ensuring that we optimize **safety, efficiency** and **quality in operations.**

Through its commitment to safety, quality, and innovation, Intrachem remains a cornerstone of excellence in Zimbabwe's mining industry, fostering growth and sustainability for its clients and the community alike.

Strategic Partnership: Austin Powder

Along with world-class supply partnerships, Intrachem has enhanced its offerings through an integrated strategic partnership with Austin Powder, a global industry powerhouse. This collaboration allows Intrachem to leverage Austin Powder's extensive technical expertise, innovative technologies, and established best practices, which can lead to the development of safer and more effective blasting solutions. Additionally, access to the Austin's resources has greatly facilitated our access to research and development, driving innovation in product offerings, all with the end goal of delivering efficiencies and value to our customers.

Continued on next page>>



"We leverage the power of family and treat everyone with respect"

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“At Intrachem
SAFETY is our 1st
PRIORITY”

With over 200 years' experience in the industry, 25 manufacturing plants worldwide, a vertically integrated supply chain system, a globally renowned reputation for being safety and customer focused and a growing regional footprint, Austin Powder is the ideal partner with which to bolster our capabilities and optimize our high standards commitment to our customers.

Our Products

At Intrachem we pride ourselves on our wide and comprehensive product range. If not manufactured ourselves, via selected supplier partnerships we have collated a range of the highest quality explosives and accessories available on the market today. Our range includes, but is not limited to:

- **Packaged/Cartridged Explosives**
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- **Cast Boosters**
- **Capped Fuse Detonators**
- **Non-Electric Detonators**
- **Electronic Detonators**
- **Remote Blast Initiation Systems**
- **Blast Analysis Services**
- **Technical Services**

Comprehensive Technical Services

Renowned for its bulk emulsion supply, Intrachem guarantees dependable explosive products for mining applications, supporting sectors like platinum, lithium, coal, gold, and chrome. With a network of branches across mining provinces, we ensure

reduced lead times through robust in-country stock. Our service packages deliver value through innovative blast optimization, enhancing efficiency and safety with tailored solutions.

Pre-Blast Technical Services:

- **Survey-grade drone capabilities**
- **Full face profiling**
- **Computer-aided blast design and optimization**
- **Borehole deviation measurement**
- **Expert product selection**

By leveraging digitization, we incorporate real-time reporting technology into our blasting services, allowing precise monitoring and analysis for optimal performance and safety. Our commitment to cutting-edge technology positions us as a leader in digital blasting operations.

Blast Technical Services:

- **Consistent product performance with a standardized fleet of MMUs and MCUs**
- **Unique timing solutions**
- **Rock movement simulations**
- **Vibration & overpressure simulations**
- **Drone-assisted blast videos**
- **Velocity of Detonation data collection**
- **Fly rock risk model**

Utilizing advanced software and strategic consulting, Intrachem customizes in-depth reporting and analysis. This analysis aids informed design decisions. Intrachem optimizes the MINE to MILL process, enhancing efficiencies and creating savings.



"Our service packages deliver value through innovative blast optimization, enhancing efficiency and safety with tailored solutions"



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Post-Blast Technical Services:

- 3D muck pile profile and distribution analysis
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Our services optimize blasting processes and contribute to sustainable mining by minimizing environmental impact. Dedication to excellence ensures unparalleled support, making us a preferred industry partner. We set new standards for blasting services in Zimbabwe and beyond, meeting evolving client needs while promoting responsible mining practices.

CONTACT US

General Enquiries

E-mail: apzw.enquiries@intrachem.co.zw

Intrachem Harare

Phone: +263776902796

E-mail: harare@intrachem.co.zw

Intrachem Bulawayo

Phone: +263777343974

E-mail: bulawayo@intrachem.co.zw

Intrachem Kadoma

Phone: +263682127650

E-mail: kadoma@intrachem.co.zw

Intrachem Kwekwe

Phone: +263552525402

E-mail: kwekwe@intrachem.co.zw

Intrachem Chinhoyi

Phone: +263672126112

E-mail: chinhoyi@intrachem.co.zw

Intrachem Filabusi

Phone: +263772133055

E-mail: filabusi@intrachem.co.zw

Intrachem Zvishavane

Phone: +263772162699

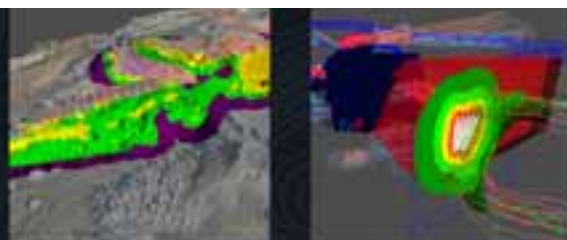
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Interview: Minister Of Mines and Mining Development Hon Winston Chitando



Hon Winston Chitando

What measures is the government of Zimbabwe taking to ensure Policy stability and investor confidence in the mining sector?

The Ministry is amending the Mines and Minerals Bill which had become archaic to make it contemporary, introduce the computerized cadastre system, define strategic minerals and streamline mining titles.

The Government of Zimbabwe has been reforming policies to attract foreign direct investment (FDI). The government established a one-stop centre, the Zimbabwe Investment Development Authority (ZIDA) make it easier for investors to enter the sector.

What would you say are the most promising opportunities for investors in Zimbabwe's mining sector over the next five years?

Zimbabwe's mining sector offers a range of promising opportunities for investors over the next five years, driven by the country's abundant mineral resources, favourable policy reforms, and increasing global demand for critical minerals. Below are some key areas of opportunity:

Critical Minerals and Battery Metals

Lithium: Zimbabwe is one of the world's top producers of lithium, a critical mineral for electric vehicle (EV) batteries. The global

EV market is expected to drive increased demand for lithium, with Zimbabwe already attracting significant investments in lithium mining and processing.

Nickel and Cobalt: These are essential components of batteries and other renewable energy technologies. Zimbabwe's deposits, particularly in the Great Dyke, present strong investment opportunities.

Gold Mining

Gold remains a cornerstone of Zimbabwe's mining industry, accounting for the largest portion of export earnings. With substantial reserves and ongoing artisanal and large-scale mining activities, gold offers lucrative investment opportunities, especially for refining and processing technologies.

Value Addition: Investments in refineries to produce higher-purity gold products for export could be highly profitable.

Platinum Group Metals (PGMs)

Zimbabwe is the third-largest producer of platinum globally, with the Great Dyke holding significant reserves of platinum, palladium, and rhodium. Global demand for PGMs, driven by their use in catalytic converters and hydrogen fuel cell

technology, creates opportunities for exploration, mining, and beneficiation.

Coal and Thermal Energy

Zimbabwe has substantial coal reserves and opportunities to develop thermal power projects, both for domestic use and export to neighbouring countries. With the energy transition, coal remains essential in some sectors, particularly in the short-to-medium term.

Diamond Mining

Zimbabwe's diamond fields, particularly in the Marange area, remain underexploited. With the potential for public-private partnerships, investors could tap into exploration and mining ventures.

Rare Earth Elements (REEs)

The increasing global demand for rare earth elements, used in high-tech applications like renewable energy systems, electronics, and defence technologies, presents a nascent but promising sector in Zimbabwe.

Value Addition and Beneficiation

Policies encouraging local processing and beneficiation of minerals provide opportunities for refining, smelting, and manufacturing finished products. For example, setting up lithium-ion battery manufacturing facilities could provide downstream value from the country's lithium resources.

Are there plans to expand exploration activities for underexploited minerals like lithium, rare earths, and uranium?

The Ministry is amending the **Mines and Minerals Bill** which had become archaic to make it contemporary, introduce the computerized cadastre system, define strategic minerals and streamline mining titles.

Plans for expansion are there as the country is focusing on leveraging its rich mineral resources to drive economic development and meet the growing global demand for these critical minerals.

Lithium Exploration:

The government is actively promoting its "Zimbabwe is Open for Business" policy to attract foreign investment in the mining sector, particularly from countries like China, which has already invested heavily in lithium mining operations. Recent

policies have been implemented to encourage local processing of lithium, including a ban on the export of unprocessed lithium to enhance domestic beneficiation.

Rare Earth Elements:

The global demand for these minerals is rising, and Zimbabwe's mineral wealth positions it well to explore these opportunities as part of its broader mining strategy.

Uranium Exploration:

There was interest in expanding Zimbabwe's uranium exploration activities. With the global shift towards nuclear energy as a cleaner alternative, there is potential for renewed focus on this sector.

What specific incentives does Zimbabwe offer to attract foreign direct investment into the mining sector, particularly in critical minerals?

The Government of Zimbabwe came up with a raft of both fiscal and non-fiscal incentives. These include the following:

Income Tax

All capital expenditure on exploration, development and operations incurred wholly and exclusively for any mining operations is allowed in full.

Assessed Losses

There is no restriction on the carryover of tax losses, these can be carried forward for an indefinite period.

Exemption from Certain Taxes

After consultation with the Minister responsible for the administration of the Mines and Minerals Act, the Minister of Finance may declare the holder of a Special Mining Lease to be an approved holder of a special mining lease for the purposes of exemption, wholly or partly, from the following taxes:

Non-Residents shareholders tax;
Non-Residents tax on Fees;
Non-Residents tax on Remittances;
Non-Residents tax on Royalties.

Customs Duty

Rebate of duty is granted to the grantee of a special grant issued under the Mines and Minerals Act authorizing the exploration or production of petroleum.

Deferment of Value Added Tax

VAT deferment is granted to mining companies on capital imported for a period of 120 Days subject to the conditions set by the Commissioner General.

How is the government addressing transportation and power supply challenges to ensure uninterrupted mining operations?

There are a number of power plants being constructed in Hwange for example the 300MW plant by Zhonjin Heli Energy Private Limited among others.

Two notable projects are also in the pipeline:

Beitbridge Energy Industrial Park (Palm River Project) – aims to bolster Zimbabwe's mining and energy sectors. The first phase involves thermal power generation resulting in the production of 50 megawatts of electricity.

Mapinga Mines to Energy Industrial Park - aims to enhance the beneficiation and value addition of the country's mineral resources, particularly lithium. It will create a manufacturing industry for commodities such as lithium batteries and electric vehicles. The industrial park will feature two 300-megawatt power stations, among graphite and nickel processing plants. The power stations are meant to improve the country's energy situation.

Direct Power Imports:

Mining companies are allowed to import power directly from neighbouring countries through the Southern African Power Pool (SAPP). This arrangement enables large mining operations to secure additional electricity supply, mitigating the impact of local power shortages.

Transportation:

The government is focusing on improving transportation infrastructure, including roads and railways, to facilitate the efficient movement of minerals from mines to processing facilities and export points and there has been commendable progress so far.

Zimbabwe has been talking about the Cadastre system, where is the country on this and why has it taken so long to implement?

The system will be rolled out in phases. The

first phase which is the Pilot Project in Manicaland is already underway. It is expected to be online soon.

Since CSR is not mandatory in the country, how are mining communities in Zimbabwe benefiting from mining activities in their areas?

Job Creation:

Mining operations provide numerous direct and indirect employment opportunities, including jobs for mine workers, engineers, technicians, and support roles in related industries such as manufacturing and logistics. This helps reduce unemployment rates and improves living standards in mining communities.

Economic Growth:

The influx of jobs and income from mining activities stimulates local economies. Increased disposable income leads to higher consumption, benefiting local businesses and contributing to overall economic growth in the region.

Tax Revenue:

Mining companies contribute significantly to government revenue through taxes, royalties, and other financial contributions. This revenue is crucial for funding public services such as education, healthcare, and infrastructure development, which indirectly benefits mining communities.

Infrastructure Development

Mining activities often necessitate the development of essential infrastructure, including roads, railways, and power supply systems. These improvements not only support mining operations but also enhance accessibility for local communities.

Community Projects:

Some mining companies voluntarily invest in community development projects, such as building schools, clinics, and providing clean water initiatives. While these efforts are not mandated, they positively impact local communities and improve their quality of life.

What steps are being taken to enhance value addition and beneficiation within Zimbabwe before exporting minerals?

Bans on Raw Exports: Zimbabwe has implemented bans on the export of

Continued on the next page>>

unprocessed raw minerals, particularly lithium and base minerals. This policy is designed to promote domestic processing and value addition.

Legislative Measures: The government has adopted a legislative approach that includes export tariffs and embargoes to stimulate local processing.

Incentives for Local Processing: The Zimbabwean government plans to introduce incentives aimed at encouraging mining companies to process their minerals locally rather than exporting raw materials.

What mechanisms are in place to enhance transparency and reduce corruption in the allocation of mining licenses?

The country has recognized the critical need to enhance transparency and reduce corruption in the allocation of mining licenses which is why it is rolling out the online Cadastre system.

What assurance can you provide to potential investors about the security of tenure and protection against expropriation in Zimbabwe's mining sector?

Legal Framework:

The Mines and Minerals Act [Chapter 21:05] serves as the principal legislation governing mining rights in Zimbabwe. This Act provides a structured legal framework that outlines the rights and obligations of mining titleholders, ensuring that their interests are protected under the law.

State Ownership of Minerals:

While the state owns all minerals, the legal framework allows for the granting of mining rights that are bankable and transferable. This creates a secure environment for investors, as mining rights can be legally recognized and enforced.

Investment Protection:

The Mines Bill aims to further strengthen the security of mining tenure, addressing concerns related to property rights and expropriation.

How is the Ministry of Mines leveraging artificial intelligence (AI) to enhance efficiency, transparency, and decision-making in Zimbabwe's mining sector to attract modern, tech-savvy investors?

The Ministry of Mines and Mining

Development is actively embracing artificial intelligence (AI) to transform Zimbabwe's mining sector into a model of efficiency, transparency, and informed decision-making.

One of the Ministry's flagship initiatives is its collaboration with the Harare Institute of Technology (HIT) to develop an Online Export Permit Tracking System. With AI-powered analytics, the Ministry can detect anomalies in export data, flagging potential leakages and irregularities. By embracing AI, the aim is to build a resilient and competitive industry that benefits all stakeholders, including tech-savvy investors, while safeguarding Zimbabwe's rich mineral resources.

How is Zimbabwe collaborating with regional and international organizations to boost the mining sector?

Investment Partnerships:

Zimbabwe is engaging with international investors and companies to develop its mining resources. These partnerships are crucial for attracting the necessary capital and expertise to boost the sector, especially in lithium and other critical minerals.

Technology Transfer:

The government is working with foreign companies to facilitate the transfer of advanced mining technologies. This collaboration aims to modernize mining operations, improve efficiency, and enhance the overall productivity of the sector.

Regional Cooperation:

Zimbabwe is part of regional initiatives aimed at enhancing mining cooperation within the Southern African Development Community (SADC). These initiatives focus on harmonizing mining policies, sharing best practices, and promoting cross-border investments in the mining sector. Zimbabwe is aligning its mining policies with global standards to ensure environmental protection and social responsibility, which are increasingly important to international investors.

Tell the person reading this why they should consider investing in Zimbabwe Mining.

Growth Potential

The country is still under-explored and there is huge potential for new discoveries,

particularly using modern exploration techniques. Opportunities therefore exist in the use of modern exploration techniques to discover new gold deposits. Investors may venture into exploration as private entities or through partnerships with Government, through the Mining Promotion Corporation.

Value Addition and beneficiation

Zimbabwe is actively promoting value addition and beneficiation of its minerals before export. There are a lot of investment opportunities in the value addition and beneficiation of minerals along the mining value chain. These include base metal and precious metal refineries for PGMs in Zimbabwe, beneficiation of lithium to lithium carbonate and lithium sulphate, gold to gold bullion and jewellery, iron ore to steel and a whole lot more. The list is endless.

Supportive Government Policies

The Zimbabwean government is committed to creating a conducive environment for investment. Recent proposals, such as the Mines and Minerals Act Amendment Bill, aim to make the sector more progressive and investor-friendly.

Strategic Location

Zimbabwe's geographical location in Southern Africa provides access to regional markets and trade routes, making it a strategic hub for mining operations and exports.

Emerging Opportunities in Lithium

Zimbabwe's lithium deposits are among the largest in Africa, with the potential to meet a significant portion of global demand. This positions the country as a key player in the growing battery minerals market, attracting interest from international investors.

Infrastructure:

There is good infrastructure to support mining activities. There are good roads, making various places accessible. The main airport has been revamped to a world-class status, to further attract more investors.

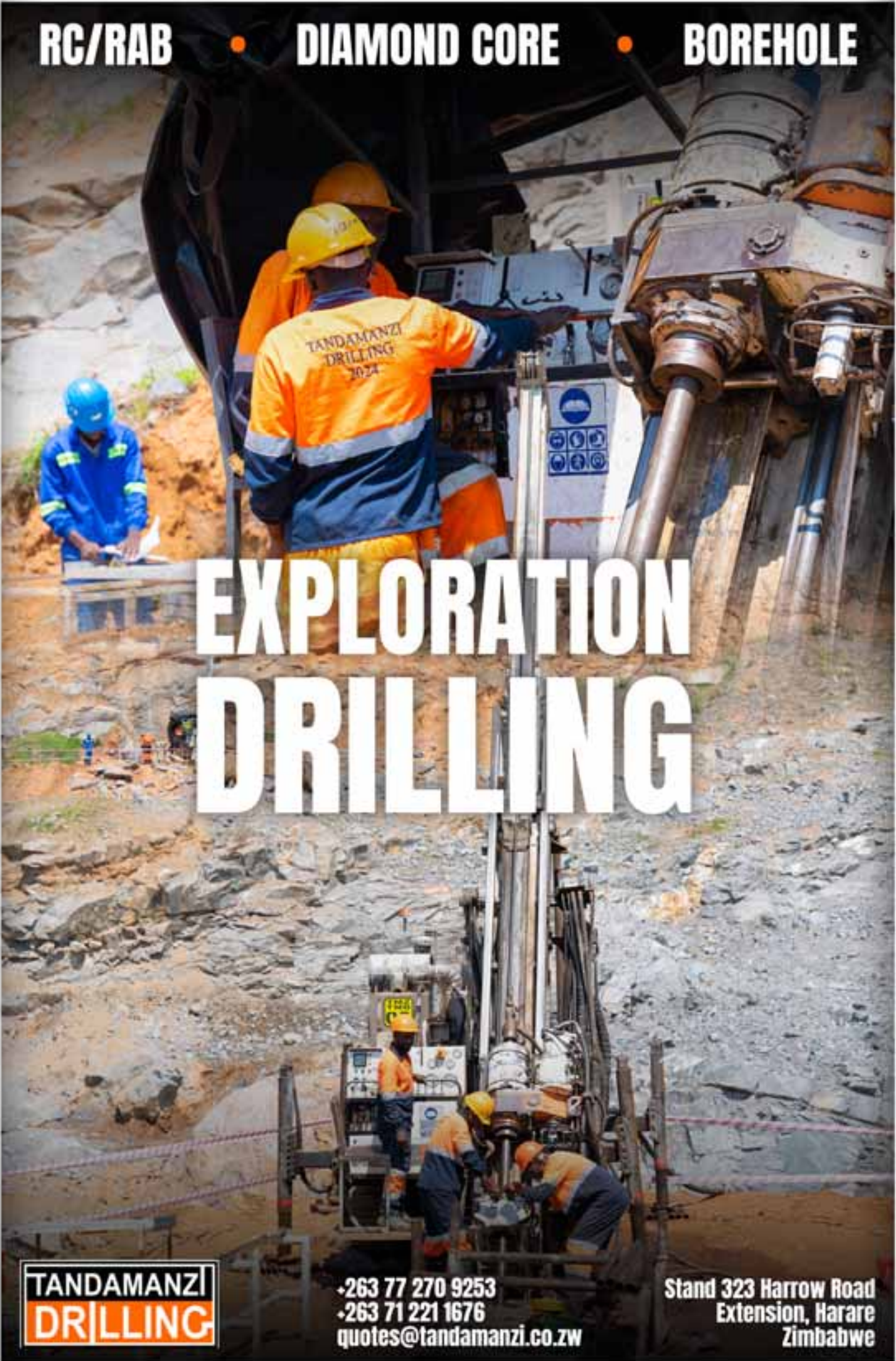
Skilled Labour force:

There is also a lot of readily available skilled labour force. 

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Interview: Minerals Marketing Corporation of Zimbabwe (MMCZ) General Manager Dr Nomsa J Moyo



MMCZ General Manager Dr Nomsa J Moyo

What role does MMCZ play in promoting Zimbabwe's mineral resources to global investors, and how have these efforts evolved over the years?

As the designated sole agent for the marketing and selling of all Zimbabwean minerals (excluding silver and gold), the Minerals Marketing Corporation of Zimbabwe (MMCZ) plays a crucial role in promoting the nation's mineral wealth. MMCZ has created a strong foothold of Zimbabwe minerals in the international arena through active engagement in international conferences and exhibitions and by actively developing new lucrative markets. This proactive approach has yielded tangible results, with a significant increase in sales volume. In 2024, MMCZ achieved a remarkable 19% surge in sales volume, reaching a total of 4,161,092Mt, a clear testament to the effectiveness of our marketing and market development efforts.

What unique opportunities do Zimbabwe's critical minerals, such as lithium and platinum, present to international investors looking for sustainable mining projects?

Zimbabwean is endowed with a number of minerals most of which require value addition and beneficiation. Among such minerals are lithium and platinum which offer international investors huge opportunities in value addition and beneficiation.

As the world shifts its focus towards green energy, Zimbabwe's huge resource base in lithium and platinum, to mention just a

few, is key for any future sustainable mining projects. In addition to investment opportunities along the mineral value chain, the critical minerals sector also brings investment opportunities in side linkages such as transportation and energy generation that are further required to ensure that the mining sector is fully covered in terms of infrastructure and energy requirements. As has been outlined by His Excellency President Emmerson Mnangagwa at numerous platforms, Zimbabwe is open for business.

Zimbabwe boasts of a diverse mineral portfolio. Which minerals do you believe hold the greatest potential for attracting foreign direct investment (FDI) in the next five years?

The global energy transition towards a zero-carbon future presents significant opportunities for foreign direct investment (FDI) in critical minerals. These minerals, essential for technologies like renewable energy and electric vehicles, include beryllium, natural graphite, manganese, rare earths, among others.



Can you elaborate on MMCZ's initiatives to facilitate joint ventures or partnerships between local and international mining players?

MMCZ conducts various initiatives to facilitate joint ventures or partnerships between local and international mining players.

• Information Sharing – MMCZ

disseminates information on mining investment opportunities, project proposals and regulatory requirements at various regional and international mining investment conferences.

• **Lobbying for an Enabling Environment** - MMCZ advocates for and support policy reforms that simplify and streamline the processes for establishing and operating joint ventures or partnerships.

• **Capacity Building** - The Corporation conducts and supports capacity building initiatives for local small scale mining professionals to enhance their skills and expertise in mining management, negotiations and joint venture management.

South Africans are interested in importing chrome from Zimbabwe, take us through the process of how they can do this.

Our customer onboarding process incorporates robust Know Your Customer (KYC) procedures. To comply with KYC regulations, customers are required to submit a letter of intent, registration details, company profile, trading history, financial information, and attorney details, among others for due diligence purposes.

Potential customers can initiate inquiries through our accessible online platforms, and our sales team will respond within 24 hours. We facilitate the matching of customers with suitable suppliers based on their specific needs.

What message would you like to convey to international investors attending Mining Indaba 2025 about the opportunities in Zimbabwe's mining sector?

We are actively encouraging and inviting investors to participate in the entire value chain and maximize returns through the development of value-added industries within Zimbabwe, such as mineral beneficiation, processing and manufacturing. Our team is ready to provide you with the necessary information, guidance and support to facilitate your entry into the country's mining sector.

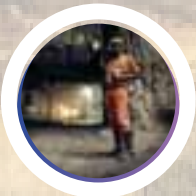
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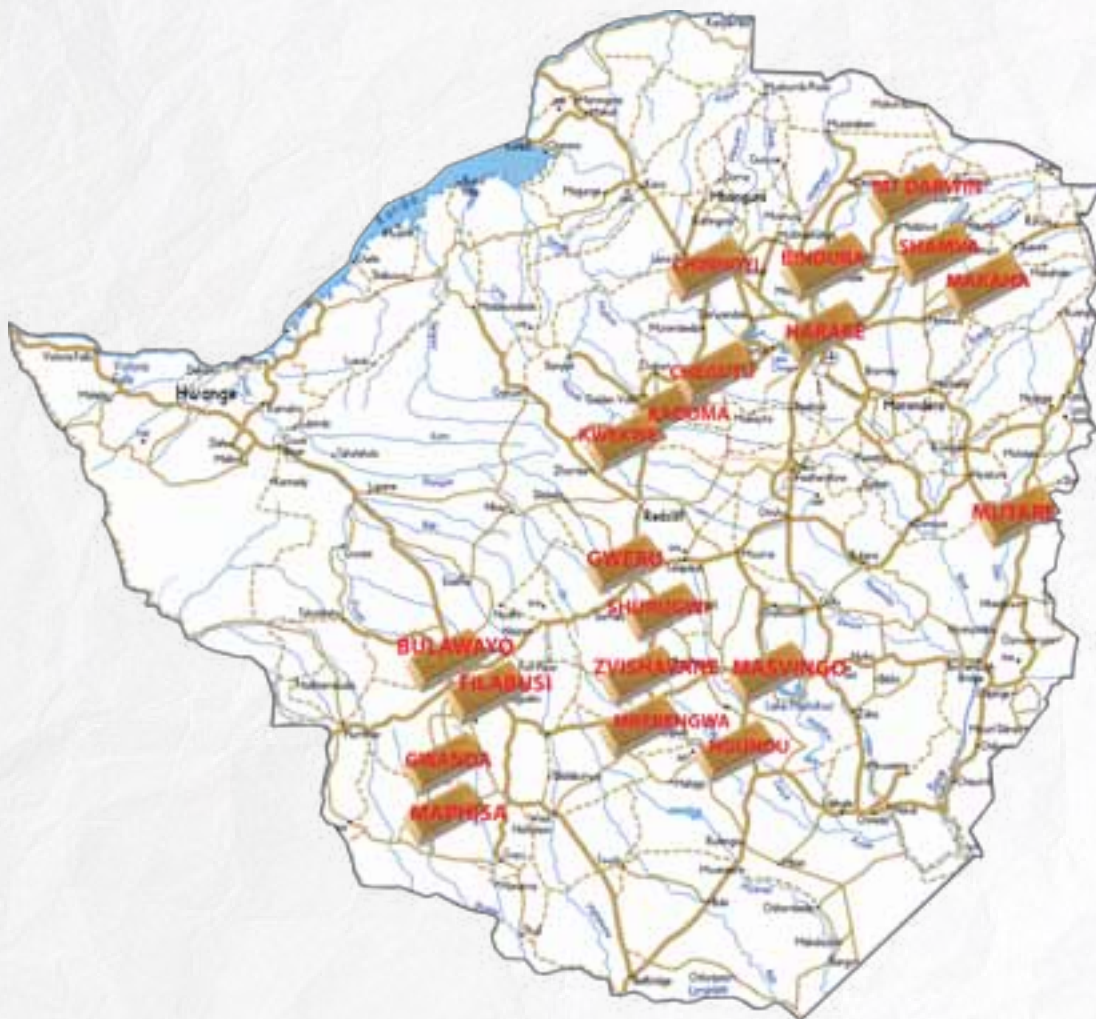
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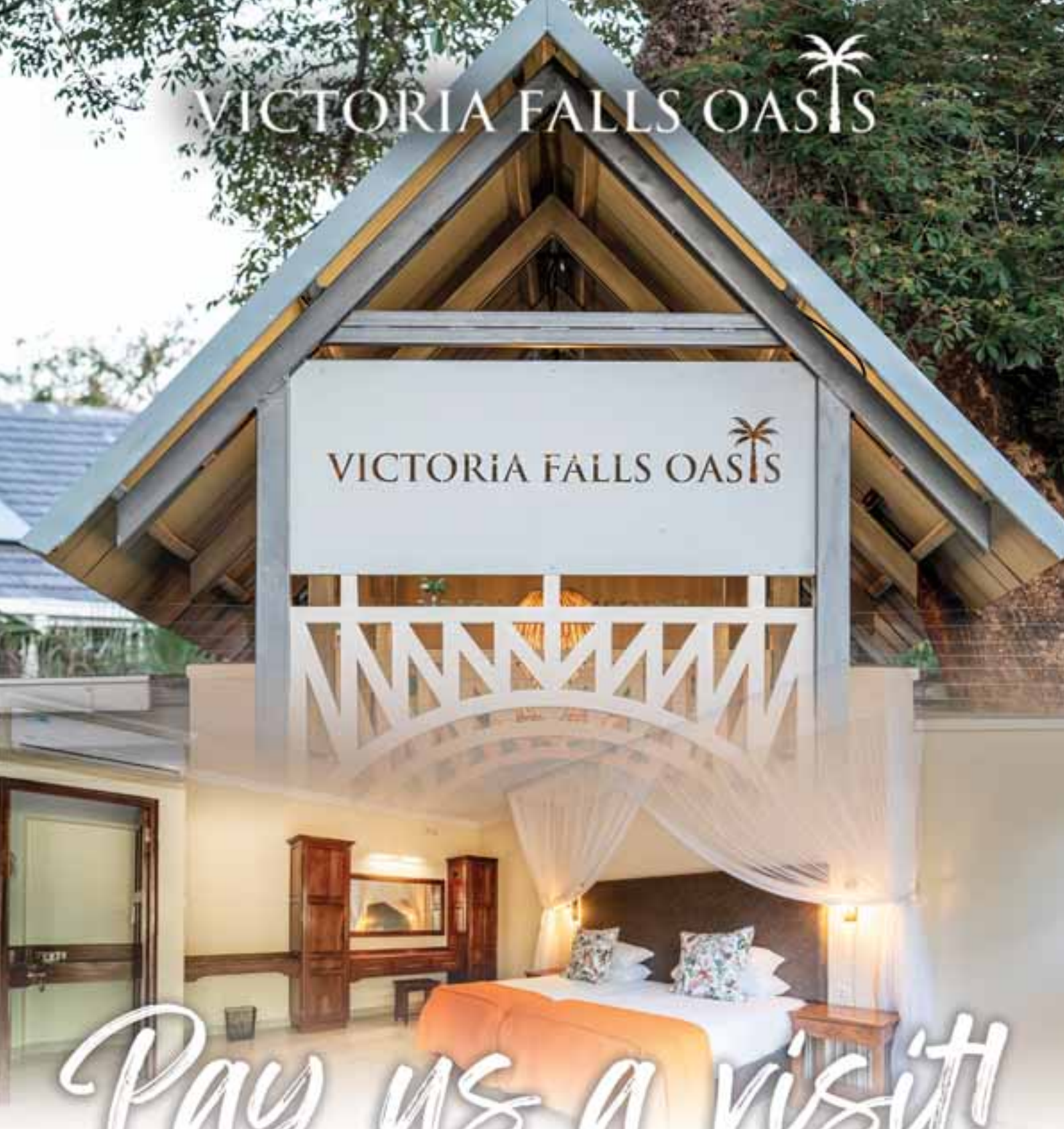
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Scott Macmillan

Invictus Energy Pioneers Oil and Gas Exploration in Zimbabwe

Victoria Falls Stock Exchange-listed oil and gas exploration company, Invictus Energy, has emerged as a leading player in Zimbabwe's burgeoning energy sector, spearheading exploration activities in the highly prospective Muzarabani-Mbire area's Cabora Bassa Basin, positioning Zimbabwe as an emerging oil and gas frontier in Southern Africa

Through successful exploration, government support, and a favourable business climate, Invictus has made significant strides in unlocking the country's untapped oil and gas potential, while reinforcing Zimbabwe's reputation as an investment destination for resource exploration.

The company's Managing Director, Mr Scott Macmillan, has consistently praised Zimbabwe's improving business environment and its vast resource potential.

Macmillan's praise stems from the company's remarkable achievements and the evolving investment climate in Zimbabwe, which is now more conducive to foreign direct investment in the energy sector.

"Zimbabwe's government has made tangible improvements in creating a business-friendly environment, especially for resource exploration. This is an exciting time for investors who are keen on exploring opportunities in emerging

energy markets," Macmillan has been quoted as saying.

Leading the Charge in the Cabora Bassa Basin

At the heart of Invictus Energy's success lies its exploration operations in the Cabora Bassa Basin, a massive geological formation that holds the potential to become one of Africa's most significant hydrocarbon deposits. Covering over 250,000 hectares, Invictus Energy's exploration license area encompasses the Muzarabani and Msasa projects in northern Zimbabwe. This basin, largely underexplored until Invictus' entry, offers promising prospects for oil and gas.

The company's most significant achievement to date is the Mukuyu-1 well, drilled in 2022. The well penetrated multiple zones rich in hydrocarbons, with data suggesting the presence of significant quantities of gas and

condensates. The Mukuyu-1 well intersected several high-quality reservoir zones, indicating the potential for commercial hydrocarbon production. This discovery is groundbreaking as it marks the first major oil and gas find in Zimbabwe and has the potential to reshape the country's energy landscape.

Resource Estimates and the Mukuyu Prospect

One of the key factors driving excitement around Invictus Energy's operations is the sheer size of the resource estimates at the Mukuyu prospect. According to an

independent assessment by ERCE (Exploration and Resource Consultants Limited), the prospect could hold up to 20 trillion cubic feet (Tcf) of gas and over 845 million barrels of conventional oil equivalent (boe) in gross mean unrisked prospective resources.

The size of the discovery and the data we've gathered confirm the incredible potential of the Cabora Bassa Basin - Scott Macmillan

Continued on the next page>>

Macmillan has referred to the Mukuyu discovery as “a game-changer for Zimbabwe,” noting that it could transform the country into a regional energy powerhouse.

“The size of the discovery and the data we’ve gathered confirm the incredible potential of the Cabora Bassa Basin. We are excited to continue with our exploration activities and work alongside the Zimbabwean government to fully realize the benefits this project can bring,” he said.

The Mukuyu prospect is part of Special Grant (SG) 4571, which was initially granted to Invictus Energy in 2020 for a three-year exploration period. In 2023, the Zimbabwean government renewed the SG for another three years, allowing Invictus to continue its exploration activities and demonstrating the government’s commitment to supporting long-term investment in the sector.

Government Support and Ease of Doing Business

A key factor behind Invictus Energy’s success in Zimbabwe is the favourable regulatory environment and the strong support from the Zimbabwean government. The government has recognized the transformative potential of oil and gas exploration and has made significant efforts to create a business-friendly environment for foreign companies. Through agencies such as the Zimbabwe Investment and Development Agency (ZIDA), the government has streamlined investment processes, making it easier for foreign investors to secure the necessary approvals and navigate the regulatory landscape.

In particular, the renewal of the Special Grant for Invictus Energy was a clear indication of the government’s support for the company’s efforts. The SG, which covers the Muzarabani-Msasa area, was renewed in 2023 for another three-year period, allowing Invictus to continue its exploration activities in the Cabora Bassa Basin. Macmillan expressed his gratitude for the government’s support, stating, “The renewal of our Special Grant is a clear indication of the government’s support for our exploration efforts and its broader commitment to growing the oil and gas sector. We are grateful for the collaboration we’ve enjoyed with the Ministry of Mines and Mining Development and the broader government, which has played a pivotal role in ensuring our success.”

This strong government backing reflects Zimbabwe’s broader efforts to improve the ease of doing business and attract foreign direct investment. Under the leadership of President Emmerson Mnangagwa, the government has made significant strides in creating a transparent and supportive framework for investors, particularly in the resource sector. The introduction of new regulations specifically for oil and gas exploration, as well as updates to the Mines and Minerals Act, have provided clarity and certainty for companies operating in Zimbabwe’s burgeoning energy sector.

Macmillan has been vocal about Zimbabwe’s improving business climate, stating that the regulatory environment in the country is more transparent.

“The reforms introduced by the government in recent years have made a tangible difference in our ability to operate in Zimbabwe. The regulatory environment is more transparent, and we’ve been able to engage constructively with government officials at every stage of the project. This has made Zimbabwe an attractive destination for resource exploration, and we’re confident that this will continue as the sector develops further,” he said.

Oil and Gas Discovery: Economic and Social Impacts

The potential economic impact of Invictus Energy’s discoveries in Zimbabwe cannot be overstated. The successful development of the Mukuyu prospect and other potential oil and gas fields could transform Zimbabwe’s economy by reducing the country’s reliance on imported energy and creating new revenue streams from hydro-carbon exports.

Zimbabwe currently imports most of its energy, including petroleum products and electricity, from neighbouring countries. The discovery of domestic oil and gas reserves could significantly reduce the country’s energy import bill and strengthen its energy security. Moreover, the potential for Zimbabwe to become a net exporter of oil and gas would provide a much-needed boost to the economy, generating foreign exchange earnings and creating new opportunities for investment in infrastructure and other sectors.

“The discoveries we’ve made in the Cabora Bassa Basin position Zimbabwe as a future energy exporter. The scale of the resources we’re uncovering means that there’s not only enough to meet domestic demand but also to supply neighbouring countries.

This is an incredible opportunity for Zimbabwe to strengthen its energy security and generate significant revenue from exports,” Macmillan said.

The development of Zimbabwe’s oil and gas sector would also have a significant social impact, particularly in terms of job creation and skills development. The exploration activities undertaken by Invictus Energy have already created hundreds of jobs, many of which have been filled by local workers. As the project moves towards commercial production, the number of direct and indirect jobs is expected to increase significantly, providing new opportunities for Zimbabweans in the energy sector and related industries.

Environmental and Regulatory Framework

According to Macmillan, as Invictus Energy advances its exploration efforts, the company has been mindful of its environmental responsibilities. The company has worked closely with the Zimbabwean Environmental Management Agency (EMA) to ensure that its operations are conducted in an environmentally sustainable manner. Comprehensive Environmental and Social Impact Assessments (ESIAs) have been carried out to identify potential environmental impacts and develop strategies to mitigate them.

“We take our environmental responsibilities very seriously. From the beginning of this project, we’ve been focused on minimizing our environmental footprint and ensuring that our operations are in line with international best practices. We’re committed to working with the government and local stakeholders to ensure that this project benefits everyone involved while protecting the environment,” he said.

The Zimbabwean government has also played a key role in ensuring that the regulatory framework governing oil and gas exploration is robust and transparent. Recent updates to the country’s legal framework, including new regulations specifically for the oil and gas sector, have provided clarity for investors and helped to ensure that the sector operates in a sustainable and transparent manner.

Mining Insurance Outlook for 2025



The 2025 insurance outlook for the mining sector is shaped by various factors, including evolving insurance industry regulations, operating models, mining regulations, and emerging risks. Here are some key risks and developments to consider as your entity plans its insurance and risk management approach for 2025:

Key Risks for 2025

There are several risks that Mines face and most have traditional insurance and risk transfer mechanisms that are currently being used to deal with them. However, the following risks will affect a broad spectrum of miners regardless of the minerals they are focused on:

a. Environmental and climate change risks

Mines are exposed to increasing environmental and climate-related risks, such as natural disasters, water scarcity, and pollution.

• Limiting access to resources

Climate change can make it difficult to access water and energy, which can limit the establishment of new mines or make existing mines uneconomical.

• Greenhouse gas emissions

Mining activities like coal mining, contribute to greenhouse gas emissions, which has been a global focus matter. The global insurance market has been decreasing its appetite for mining risks

with large greenhouse emissions. This may mean increased insurance premium rates on certain risks or curtailed cover for mining entities particularly if your cover has offshore reinsurance participation.

• Environmental Damage

Mining activities especially by the smaller scale and artisanal miners have been linked to deforestation, erosion and water pollution among other environmental damage matters. An enforceable rehabilitation approach is required for these small-scale players either collectively through associations such as Zimbabwe Miners Federation or company-specific insurance solutions.

b. Regulatory and compliance risks

Mines must navigate complex regulatory frameworks and comply with evolving laws and standards which will also be affected by changes in local insurance regulations.

• Localisation of Marine Insurance business

The proposed localisation of Marine insurance business will most likely result in mines having to purchase all their marine covers locally in Zimbabwe. This may initially result in higher premium rates than those being enjoyed on offshore policies as the local re/insurance market absorbs these risks. Over the coming years, the rates will be expected to soften.

• Anticipated changes to external reinsurance placements

The anticipated changes to external reinsurance placements (currently in consultative stages) are expected to improve the quality of participating external companies participating in local risks and also ensure that where there is local capacity to absorb risks, these are kept in Zimbabwe.

This will mean that where mine insurance programs are approved for external reinsurance placement, there will be greater scrutiny of the players in a manner aimed at protecting mining companies and ensuring the viability of external partners when it comes to loss payments.

c. Cyber risks

Of particular interest is the growing cyber exposure to local mines due to productivity being increasingly integrated with sophisticated computer and cyber-based automation systems. With the growth of Artificial Intelligence (AI), this could also result in further cyber integration for mines. It is therefore important to review your cyber insurance cover and risk management approach.

d. Market and economic risks

Mines face volatile commodity prices, shifts in government policies, events such as war and supply chain risks among others.

Various risk management and insurance solutions exist to help mines navigate such risks.

For example, suppliers to a new mine might require insurance guarantees to be able to extend credit terms for equipment supply. A new investor going into a country for the first time might require political risk insurance solutions. Shifts in government policy may result in extra compliance requirements for mines some of which can be transferred to the insurance market.

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The Impact of Technical Mine Visits on Zimbabwe's Mining Sector



AMMZ President Eng Abel Makura

The Association of Mine Managers of Zimbabwe (AMMZ) is a professional body uniting large-scale mine managers to promote professionalism, skills development, and knowledge sharing. It serves as a platform for collaboration, networking, and addressing industry challenges. We spoke to the AMMZ President, Eng Abel Makura to get insights into the organisation's technical visits.

How do technical visits organized by the association contribute to improving mining practices across Zimbabwe?

The visits provide a platform for diverse mining professionals to share their vast knowledge and experiences within the context of the operation being visited which allows learning from each other. New learnings about technology methods, and industry best practice principles can be applied by the professionals at their various workstations.

Through networking, the visits provide an opportunity for mining professionals to foster collaborations and partnerships that have the potential to develop innovative solutions and continuous improvement.

Are foreign-based companies free to attend and showcase their products?

Foreign-based companies that provide goods and services relevant to the mining industry are welcome to attend provided they comply with the laws of the country. They could be a gateway to the introduction of the latest advancements in

technology or equipment therefore their participation is most congenial.

What are the most common technical challenges highlighted during mine visits, and how does the association help address them?

The visits are usually conducted on the goodwill of the hosts, and in the spirit of mutual respect, any opportunities for improvement, and constraints/bottlenecks that are identified by the visitors are shared with the host together with possible solutions that could be explored.

How does the association use these visits to reinforce compliance with safety, environmental, and regulatory standards?

Technical visits are not used as a vehicle for monitoring compliance but as an opportunity for knowledge sharing. However annual audits are conducted within the membership mines to address compliance to safety, environmental and regulatory standards so that mines can gauge how they are faring against internationally recognized standards.

How does the association encourage member mines to adopt sustainable practices and integrate ESG (Environmental, Social, and Governance) standards?

We provide awareness to members through workshops and seminars that are focused on sustainable mining practices

where we provide insights on the benefits and implementation of responsible mining practices. One initiative we are lobbying for our members to participate in is the Initiative for Responsible Mining Assurance whose goal is to drive positive change in the mining industry through the promotion of responsible practices that protect the environment, respect human rights, and contribute to thriving communities. This is done through rigorous standards and independent third-party verification.

How do you envision technical visits evolving to accommodate advancements such as automation, digitalization, or green mining technologies?

Autonomous mining, digital twinning, ventilation on demand and collision avoidance are the key technologies that stood out during last year's technical visits that were held at some of the big mining houses in Zimbabwe. The progress that has been made by those mines was quite encouraging to those who are still evaluating the efficacy of taking onboard such technology. The uptake across the industry is largely dependent on each organisation's appetite and strategy.

However, it will be beneficial for many to learn from the established mines that have taken the bull by its horns and are reaping the benefits of innovative technologies in the areas of safety and productivity.

As President, what legacy do you hope to leave regarding the role of technical visits in enhancing the professionalism and performance of Zimbabwe's mining sector?

As President, I hope to leave a legacy of having started the journey towards transformation of the mining industry from traditional practices to modern operations that will result in significant improvements in safety, productivity, environmental stewardship, and professionalism. The technical visits should foster a thriving environment characterized by cost management, resource optimisation, workforce development and ethical practices where human rights and fair labour practices are respected.



ASSOCIATION OF MINE MANAGERS OF ZIMBABWE (AMMZ)

Empowering Leadership in Mining

For over a century, the Association of Mine Managers of Zimbabwe (AMMZ) has been a cornerstone of excellence, knowledge-sharing, and leadership in the mining sector. Established to champion the development of mining professionals and the industry at large, AMMZ is committed to advancing sustainable mining practices and fostering innovation in Zimbabwe and beyond.

Our Vision

To be a premier professional body that nurtures leadership and promotes excellence in mining management.

What We Offer

- **Professional Networking:** Connect with industry leaders, innovators, and professionals across Southern Africa.
- **Continuous Development:** Access cutting-edge training programs, workshops, and seminars to enhance your expertise.
- **Advocacy:** Representing the interests of mine managers and influencing policy for sustainable growth in the mining sector.
- **Knowledge Sharing:** Be part of dynamic platforms for exchanging ideas and best practices.

Upcoming Highlights



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Theme: "Sustainable Mining in a Changing World"

Venue: Victoria Falls, Zimbabwe

Date: Nov 2025

4 Technical Visits



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Small-Scale Miners Power Zimbabwe's Gold Boom

ZMF members on a technical visit at one of the small-scale gold mines in Mashwest

The gold production landscape in Zimbabwe for 2024 revealed a remarkable performance by small-scale miners, who for years have consistently outperformed primary producers, stats from Fidelity Gold Refinery (FGR) have revealed.

by Keith Sungiso

With an annual contribution of 23,745.64 kg, small-scale miners submitted 65% of the total gold output of 36,486.75 kg, compared to 12,741.11 kg produced by primary operations.

Month to month Comparisons

Q1: A Mixed Start

January: Small-scale miners set the tone early, producing 1,333.44 kg, surpassing primary producers' 1,108.82 kg by 20%.

February: A brief dip saw small-scale miners trailing with 864.31 kg compared to primary producers' 988.70 kg, marking one

of the few months where primary producers led.

March: Small-scale miners produced 770.98 kg, while primary producers delivered 1,045.56 kg, further narrowing the gap. Small-scale miners trailed in this quarter.

Q2: ASM Gained Momentum

April: Small-scale miners rebounded strongly with 1,218.20 kg, slightly outpacing large-scale producers' 1,168.70 kg.

May and June: Small-scale miners surged ahead with 1,678.45 kg and 1,618.51 kg, compared to 1,055.69 kg and 999.87 kg from primary producers.

Q3: Small-Scale Miners Take Command

July: Small-scale miners nearly doubled primary production, delivering 2,425.65 kg against 1,151.77 kg.

August and September: Small-scale operations maintained their dominance, contributing over 2,390 kg each month, significantly ahead of primary producers.

Q4: Small-scale massive domination

October: The disparity peaked as small-scale miners produced a record 3,248.95 kg, more than tripling primary producers' output of 1,024.63 kg.

November and December: The year ended on a high note for small-scale miners, producing 2,651.80 kg in

November and 3,127.72 kg in December, far ahead of primary operations' 1126.36kg and 1034.51kg respectively.

Key Observations

Small-scale miners dominate submissions: Except for February and March, small-scale miners outperformed primary producers every month. This has been happening for years. However, a lot needs to be done for the ASM miners to be able to attract funding from financial institutions.

Significant Growth: Small-scale miners demonstrated the ability to ramp up production, especially in the latter half of the year. This is despite the lack of mechanisation at the bulk of the mines.

Primary Producers' Stability

While primary producers maintained a steady output, their peak production of 1,168.70 kg in April was dwarfed by small-scale miners' performance in multiple months.

Annual Totals

Small-Scale Miners: 23,745.64 kg (65%)
Primary Producers: 12,741.11 kg (35%)

The year 2024 underscored the vital role of small-scale miners in Zimbabwe's gold mining sector. ASMiners cemented their position as the leading contributors to national gold production but also highlighted the potential of the poorly funded sector to drive economic growth.



Small-scale Miners President Ms Henrietta Rushwaya



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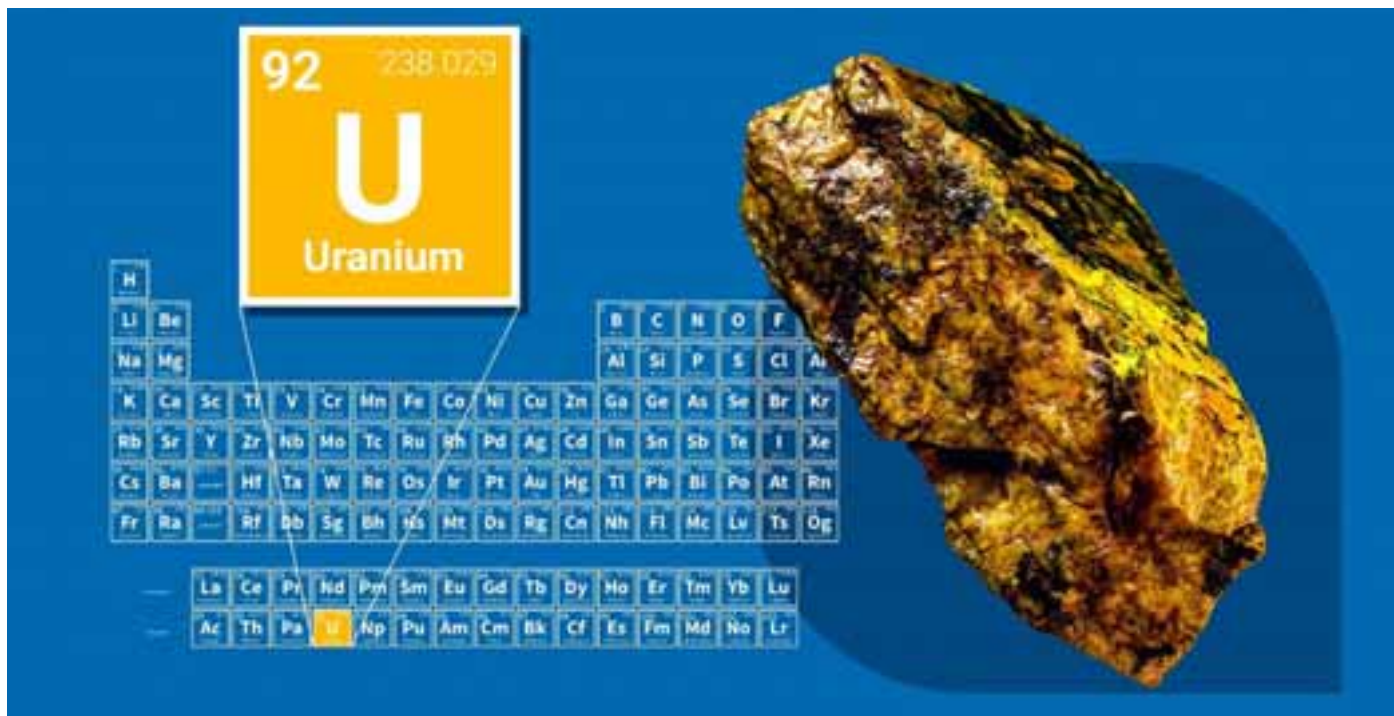
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Uranium

Can Be Zimbabwe's Next Frontier for Clean Energy Growth

As the global energy transition accelerates, the need for cleaner, more sustainable power sources has become more urgent. While solar and wind energy are often at the forefront of this movement, nuclear energy, fueled by uranium, is gaining ground as a crucial component of the clean energy mix, Mining Zimbabwe can report.



Zimbabwe, with its substantial untapped uranium resources, has a golden opportunity to capitalize on this rising demand, potentially positioning itself as a major player in the world's nuclear future.

By Rudairo Mapuranga

The quest for net-zero emissions by 2050 has created a worldwide push toward clean energy, with a significant focus on nuclear power. As governments and corporations seek alternatives to fossil fuels, uranium—the key fuel for nuclear reactors—is set to play a pivotal role in the global energy mix. Similar to the role lithium has played in the rise of electric vehicles (EVs), uranium will be essential in fueling the clean energy future. Zimbabwe, with its rich uranium deposits, could become a major supplier in this global shift toward nuclear energy.

According to the World Nuclear Association, in 2019, 479 nuclear plants were either under construction, planned, or proposed globally. While much attention has been given to other renewable energy sources like solar and wind, nuclear power remains a central piece of the clean energy puzzle. Global

uranium demand is forecasted to reach 209 million pounds by 2035, driving the need for new uranium assets to come online. Zimbabwe, endowed with uranium deposits, is poised to be part of this global shift toward nuclear energy.

Zimbabwe's geological potential for uranium mining is backed by substantial evidence from exploration and historical findings. The country's uranium deposits are largely concentrated in two areas: the Zambezi Valley and the regions surrounding the Great Dyke. One of the most notable regions for uranium exploration is the Zambezi Valley, which hosts several large uranium occurrences. Zimbabwe is believed to have uranium reserves that could support large-scale mining operations if the right investments are made.

In the 1980s, renowned geologist Jean Rheiner discovered a promising uranium deposit in northern Zimbabwe. He explained that while the project faced challenges due to falling prices, the deposit remains significant and could be revitalized with modern technology and investment.

"I had been working on uranium in the early 1980s and discovered a good deposit in the north of the country. At that time, prices collapsed, and my company pulled out. But today, with the surge in uranium prices, there's a new opportunity to exploit these deposits," Rheiner said.

He estimates that the deposit would require about US\$100 million in investment to become operational, a figure that many experts believe could be feasible given the renewed interest in uranium.

Recent activity in the uranium sector suggests that Zimbabwe has significant opportunities to develop its uranium resources. In addition to the geological potential, the country's uranium reserves are also strategically important for the global energy market. Zimbabwe's uranium, found in sedimentary rocks rich in uranium-bearing minerals such as pitchblende, is well-suited for mining. The mineralization in these deposits is also relatively shallow, making it an attractive target for surface mining, which would further reduce extraction costs and increase efficiency.

One of the major challenges facing Zimbabwe's uranium mining industry is the high capital cost of exploration and extraction. Uranium mining requires specialized equipment and technology, and the extraction process itself is energy-intensive. However, as global demand for uranium continues to rise, the long-term benefits of uranium extraction could far outweigh these initial costs.

Zimbabwe must also invest in infrastructure to support uranium mining, such as transportation networks, processing plants, and research facilities. By developing this infrastructure, Zimbabwe could create a uranium supply chain that adds value at every stage—from exploration and extraction to processing and international marketing.

"Developing infrastructure for uranium mining will not only enhance the country's capacity to produce uranium but will also create employment opportunities and boost the local economy," said a mining expert. "Additionally, Zimbabwe could strategically market its uranium to international buyers, positioning itself as a reliable supplier of uranium for nuclear power plants."

Uranium Exploration and Potential in Zimbabwe

Uranium exploration in Zimbabwe dates back to the early 1950s when ad hoc efforts were made to identify radioactive minerals. Despite limited success, the exploration effort continued with a focus on the radioactive mineral content in Karoo Group sediments. In 1969, under three Exclusive Prospecting Orders, attention turned toward the heavy mineral content in conglomerates. However, the only radioactive mineral investigated with little success during this period was monazite.

In 1972, the Messina Development Co. Ltd made a significant discovery of a large radioactive pegmatite located in the basement complex within Proterozoic terrain, as well as in the Karoo sediments. The United Kingdom Atomic Energy Authority (UKAEA) began its exploration program during the mid-1950s, including airborne and ground surveys, as well as selective core drilling in a variety of geological environments. Among these efforts was an airborne radiometric survey over the Zambezi Valley and the identification of radioactive anomalies in the Chinamora batholith, 30 km northeast of Salisbury (now Harare). However, private

companies primarily focused on more detailed surveys, particularly geological formations of interest, including alaskite dykes in the area.

Uranium exploration took a more systematic approach in Zimbabwe starting in the early 1980s. A gamma spectrometric airborne survey conducted over the Sabi Valley identified a radioactive anomaly. Although ground follow-up and drilling efforts failed to locate the anomaly's source, further exploration continued. Notably, in 1982, a helicopter-borne and ground-based survey helped screen anomalies identified earlier by the airborne survey. This led to more detailed exploration and drilling between 1985 and 1990, with technical studies focusing on hydrogeology, rock mechanics, ore processing, and mining methodologies.

The Kanyemba-1 uranium deposit, located in the northern part of Zimbabwe near the Mozambique border, emerged as a critical point in Zimbabwe's



uranium exploration history. The deposit is a tabular formation in the Upper Pebbly Arkose Formation of the Upper Karoo System. Its resources, identified as reasonably assured, are estimated at 1,800 tons of uranium (tU), with a recoverable cost of up to US\$80/kgU and an average grade of 0.6% U. These resources are mainly hosted in sandstone layers deposited by an ancient meandering fluvial system. Exploration efforts between 1991 and 1992 led to a detailed evaluation and feasibility study of the Kanyemba deposit, but due to the depressed international uranium market, these activities were terminated by the end of 1992.

In terms of geological potential,

Zimbabwe's uranium resources are believed to be most abundant in the northwestern part of the country, particularly around the Sinoia region. The area hosts disseminated copper mineralization associated with reduced zones in porous sections of the sedimentary sequences. Other regions, particularly the Karoo Group sandstones, may hold uranium-bearing potential due to conditions that allow for uranium concentration, notably in areas with low-grade metamorphism.

A significant uranium potential exists in the Karoo Group sandstones, covering an area of over 90,500 km². Though exploration in the western and southern parts of the country has been hampered by lateralization and subdued topography, the deeper layers of the Karoo sediments still present exploration opportunities. The 2018 Red Book suggests that Zimbabwe's speculative uranium resources could reach up to 25,000 tU, especially in areas where the series has undergone metamorphism, and up to 50,000 tU in speculative resources from sandstone and magmatic environments.

Given these findings, Zimbabwe's uranium sector remains an area of interest for future exploration and potential development, particularly in the context of a favourable market environment. The Kanyemba deposit's identified resources and the general geological potential of Zimbabwe offer significant opportunities for both exploration and mining of uranium, provided that market conditions improve and further investment is directed into this sector.



Living legend - Jean Rheiner

Gold in the Dacite: How Mine's Geological Discovery Offers New Frontiers

The How Mine, a long-standing pillar of Zimbabwe's gold mining industry, has once again proven its status as a geological treasure trove. Recent exploration efforts have unearthed a promising new frontier in the mine's dacite-hosted environment, heralding exciting opportunities for future resource expansion and economic growth.



AMMZ members being briefed before going underground at How Mine. Image Mining Zimbabwe

Situated just south of Bulawayo, the How Mine has a rich history of gold production dating back decades.

By Ryan Chigoche

Known for its steeply dipping orebodies, such as the 300N and 180N, the mine has consistently adapted to the challenges posed by complex geology. Over the years, the transition from sludge drilling to deeper diamond drill holes has enabled the Bulawayo Mining Company (BMC) to delineate resources more accurately and optimize extraction methods.

Recent underground exploration undertaken by Namib Minerals' Aaron Radonich and Allan Blair between the 30 Level and 32 Level has identified three new orebodies: 320N, 330N, and 360N.

According to the recent mineralization report released by the company, measured resources decreased by 17%, primarily due to mining depletion, but were offset by gains from new blocks and reclassification. Indicated resources surged by 658%, particularly from the mining area between the 30 and 32 Levels. Overall, combined measured and indicated tonnage increased by 187%, though the grade decreased by 6%, leading to a 170% increase in contained gold.

Inferred resources grew by 40%, mainly

from sands and blocks below the 30 to 34 Levels. Underground reserves rose by 5%, with proved reserves up 2% and probable reserves increasing by 8%. These gains reflect ongoing progress in resource expansion and upgrading.

Unlike the historically mined orebodies, the new orebodies are hosted within dacite, a completely different geological environment. The discovery opens the door to new exploration targets, with the potential to significantly expand the mine's resource base.

Dacite is a volcanic rock that forms when lava rich in silica solidifies quickly. It's a light-colored, igneous rock composed of plagioclase feldspar and quartz and is associated with gold mineralization.

The dacite-hosted orebodies bring unique challenges and opportunities. Early evaluations suggest sharp grade boundaries and well-defined mineralized zones, a characteristic that simplifies resource modeling and ensures efficient planning for future mining activities. This discovery also highlights the importance of advanced geological understanding in uncovering Zimbabwe's hidden wealth.

The existing orebodies at How Mine are structurally controlled, formed by hydrothermal solutions migrating along extensional duplexes. They exhibit

significant hydrothermal alteration, including carbonation, silicification, and occasional propylitization, with gold mineralization commonly associated with late-stage pyrite and chalcocite. The new dacite-hosted orebodies add an intriguing dimension to this geological narrative, presenting an environment that may hold untapped potential for further discoveries.

This development comes at a crucial time for Zimbabwe's gold mining industry, which is striving to boost production and attract investment. By venturing into previously unexplored geological environments, How Mine sets a benchmark for innovation and exploration in the sector. The discovery underscores the need for continued investment in advanced exploration techniques and geotechnical expertise to unlock the country's mineral wealth.

As exploration continues and the industry adapts to meet evolving challenges, Zimbabwe has the opportunity to reaffirm its position as a global leader in gold mining. With careful planning and a commitment to sustainable practices, the discoveries at How Mine could become a beacon of hope and progress for generations to come.

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The Future of Coal in Zimbabwe's Energy Mix: A Just Transition Debate

As Zimbabwe embarks on a journey toward industrialization and energy sustainability, the nation finds itself at the heart of Africa's energy transition debate. While the global focus shifts towards renewable energy sources, Zimbabwe must balance its environmental goals with economic realities.

This delicate balancing act places coal at the forefront of the country's energy mix, a critical resource that Zimbabwe cannot afford to abandon in its pursuit of development.

By Rudairo Mapuranga

The country's role in Africa's energy transition is multifaceted. Zimbabwe is endowed with abundant coal reserves, and coal remains an essential source of energy for both domestic use and industrial growth. As Africa's energy needs continue to expand, especially with the rise of beneficiation processes for critical minerals like lithium, Zimbabwe must consider coal as a reliable, cost-effective solution.

William Gambiza, CEO of Hwange Colliery Company Limited (HCCL), captured the essence of the challenge, stating, "Africa faces unique challenges, and in the context of the energy crisis, coal remains a reliable source." While many countries push towards renewables, coal provides a consistent energy baseload that is essential for Zimbabwe's industrialization.

Coal and Industrial Growth: The Backbone of Beneficiation

The beneficiation and value addition of minerals, key pillars of Zimbabwe's economic policy, require vast amounts of reliable energy. Coal plays a crucial role in this process. Zimbabwe's large-scale lithium production, for example, is highly energy-intensive. In regions like Matabeleland North, where coal mining operations are expanding, coal-fired power stations provide the necessary baseload power to sustain these energy-demanding processes.

Key projects like the resuscitation of Hwange Colliery's coke battery, the expansion of Dinson Colliery's coking capacity, and the construction of new thermal power plants such as Zhongjin Heli Energy's 300MW plant are poised to support Zimbabwe's industrial needs. These developments underscore coal's continued relevance in Zimbabwe's energy landscape.

A Just Energy Transition: Avoiding Energy Poverty

While renewable energy is vital for Zimbabwe's future, transitioning too quickly or entirely could leave the country vulnerable to energy poverty. Zimbabwe, like many developing nations, cannot afford to forgo the economic benefits of coal while attempting to build up renewable infrastructure. The current power shortages, coupled with an unreliable grid, demonstrate that coal remains a critical component of energy security.

Zimbabwe's coal reserves, primarily concentrated in the Hwange region, are projected to contribute over 10 million tonnes of production in 2024. This output will be essential for both domestic consumption and regional exports, further positioning Zimbabwe as a key player in Southern Africa's energy markets.

Cleaner Coal Technologies: Striking a Balance

The future of coal in Zimbabwe need not be at odds with environmental sustainability. The introduction of cleaner coal technologies can help Zimbabwe mitigate the environmental impact of its coal operations. Companies such as Dinson Colliery and ZZCC are already exploring ways to make their operations more environmentally friendly, including the use of coke oven gas for electricity generation. By investing in "green coal" technologies, Zimbabwe can meet global environmental standards without compromising its industrial growth.

Furthermore, research into the development of Zimbabwe's petrochemical industry, using by-products from coke production, presents an opportunity to add value to coal-related industries. This will not only reduce emissions but also support job creation and economic growth.

Lessons from the West: Coal as a Development Tool

To understand Zimbabwe's position in the global energy transition, one can look to the policies of former U.S. President Donald Trump. Trump's aggressive pro-coal stance was centered on the idea that coal could revitalize American industry. As he once stated, "America will

build more, bigger, and better coal power stations than China," sending a clear message that coal was still an indispensable resource for economic growth.

Zimbabwe, like the United States under Trump, can use its coal reserves to power its industrial future. The global push for renewables should not overshadow the fact that coal played a key role in the industrialization of the West. As William Gambiza, CEO of HCCL Holdings, explained, "Africa faces unique challenges, and in the context of the energy crisis, coal remains a reliable source." Coal-fired power stations provide a stable energy baseload that renewables, in their current form, cannot.

For Zimbabwe, coal provides a pathway to energy security and economic prosperity. As one observer pointed out, Zimbabwe needs only about 50,000 tonnes of coal per day to generate 5,000MW of electricity, a fraction of what countries like South Africa and China consume daily. This demonstrates that Zimbabwe's coal use, while necessary, will not contribute significantly to global emissions compared to major industrial powers.

A Pragmatic Path Forward

As Zimbabwe navigates the complexities of the global energy transition, coal will remain a vital part of the country's energy mix for the foreseeable future. While there is an undeniable need to invest in renewable energy and cleaner technologies, the country cannot abandon its coal resources prematurely. A pragmatic approach that combines the use of coal with the development of green technologies will ensure that Zimbabwe avoids energy poverty and continues to power its industrial growth.

As Africa strives for sustainable development, the role of coal in Zimbabwe's energy landscape must be acknowledged, with a focus on ensuring a just and balanced transition that secures the country's future.

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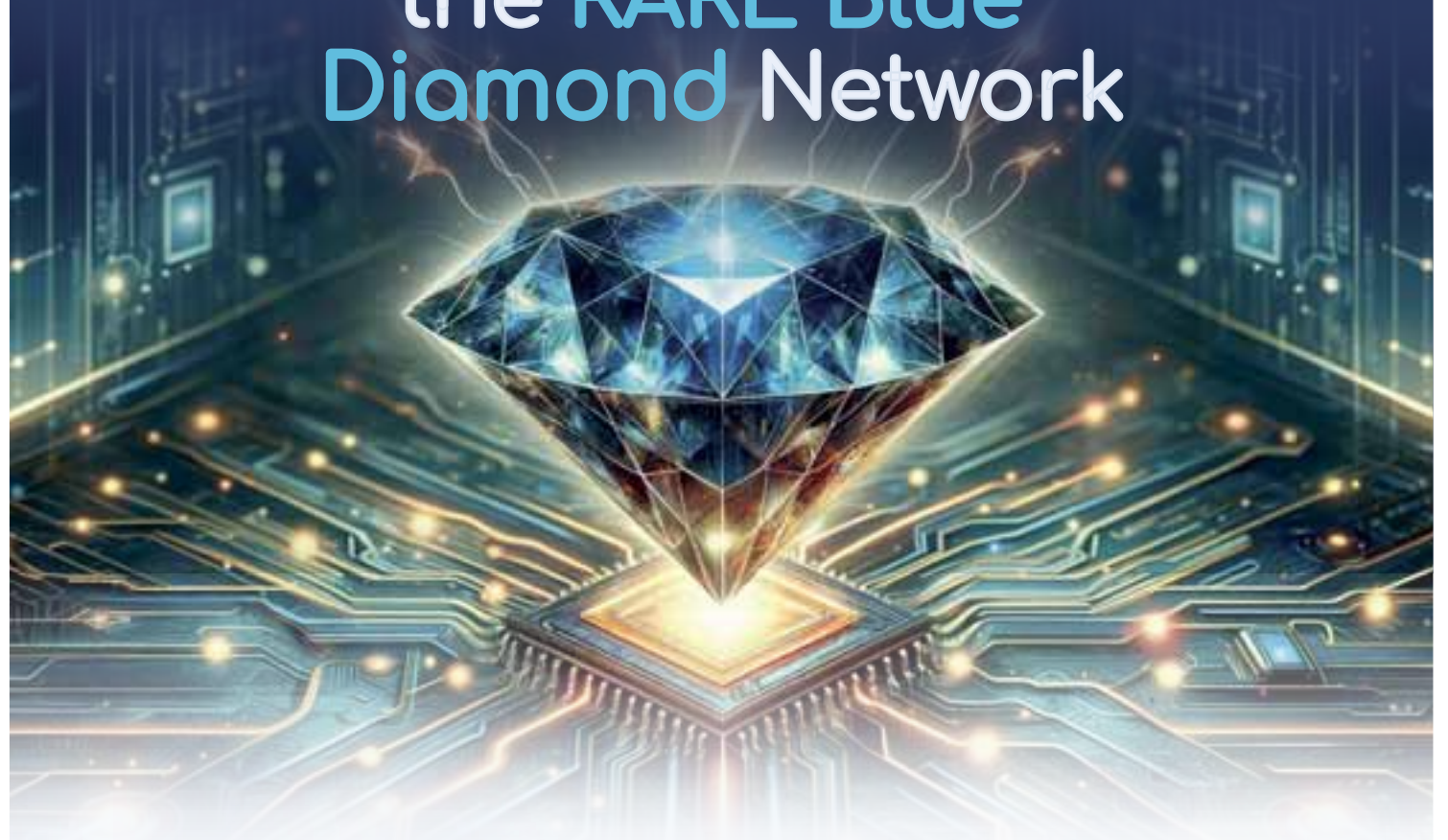
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Mining Utility and Support Vehicles at Unki Mine in Shurugwi. Image: Mining Zimbabwe

Mining Sector Leads Zimbabwe's Investment Surge in Q4 2024 – ZIDA

The Zimbabwe Investment Development Agency (ZIDA) has reported that the mining sector continued to dominate Zimbabwe's investment landscape in the fourth quarter of 2024. The sector accounted for 91 of the 200 total investment licenses issued, with a combined investment value of US\$592.42 million.

This includes US\$434.4 million in cash injections and US\$107.33 million in capital equipment imports.

By Ryan Chigoche

Investor interest in Zimbabwe remained strong during the reported period, with the number of licenses issued increasing to 200 in Q4 2024, up from 149 in the same period in 2023. The agency attributed this 19.04% increase in licenses to improvements in the licensing process, particularly the introduction of ZIDA's "Do It Yourself" Licensing Portal. With 98.1% of applications processed online, the average processing time was reduced to under five days.

However, despite the surge in the number of licenses issued, the total projected investment value saw a significant decline. It dropped by 60.12% from US\$11.5 billion in Q4 2023 to US\$4.59 billion in Q4 2024. This decrease was largely attributed to the absence of several high-value projects that had contributed to the previous year's figures.

While the mining sector attracted

US\$592.42 million, the real estate sector emerged as the leading investment sector, reporting US\$2 billion in investments. The energy sector followed closely in second place, with US\$1.04 billion, contributing to the boost in mining, which is heavily reliant on reliable energy sources.

Investment inquiries during Q4 2024 showed a strong focus on the energy sector, which accounted for 13% of total inquiries, followed by the mining sector at 11%.

ZIDA also highlighted the government's ongoing efforts to improve the investment climate. As a result, the Office of the President and Cabinet (OPC) tasked ZIDA with implementing the Single Window for Investor Entry and Establishment (SWIEE), a digital platform that streamlines access to government services for both local and foreign investors. This initiative was a direct response to feedback from the Investor Sentiment Analysis Survey, which revealed a generally positive outlook on Zimbabwe's investment prospects.

A notable development in Q4 2024 was the finalization of the Public-Private

Partnership (PPP) Guidelines, which were set to be presented to the Cabinet for approval in early 2025. These guidelines are expected to provide clearer pathways for infrastructure development through PPPs.

Commenting on the development, ZIDA Chief Executive Tafadzwa Chinamo said: "We achieved a major milestone with the finalization and approval of the PPP Guidelines by the PPP Committee. These guidelines will be presented to the Cabinet in Q1 2025 for adoption as the governing law for all Public-Private Partnerships in Zimbabwe. PPPs are pivotal to advancing Zimbabwe's infrastructure, and these guidelines will bring clarity and confidence to all stakeholders involved in impactful projects."

Looking ahead, the government remains committed to enhancing the business environment, focusing on digital transformation, regulatory clarity, and infrastructure development. With key sectors like mining, real estate, and energy continuing to attract substantial investment, Zimbabwe's economic outlook for 2025 and beyond remains positive.



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One On One with Glen Clark TPS, CT Bolts & Powermec's General Manager

In this insightful interview, we sit down with Zimplot's Mining and Infrastructure General Manager Glen Clark to discuss his career journey, the company's strategic focus on innovation, automation, and sustainability in Zimbabwe's mining sector. He shares key challenges, growth opportunities, and how TPS is positioning itself as a leader in mining equipment and services. Plus, he offers valuable advice for aspiring professionals and gives a glimpse into his personal passions beyond the boardroom.



Glen Clark

Q: Can you share a bit about your personal journey, what led you to pursue a career in sales and marketing, and how did you find yourself at the helm of Zimplot's Mining and Infrastructure division?

A: My journey into sales and marketing began with a deep interest in business strategy and understanding consumer behaviour. I started my career in sales, where I quickly discovered my passion for building relationships with clients and finding tailored solutions to meet their needs. Over the years, I honed my skills in various industries, learning the importance of adapting to changing market conditions and delivering exceptional customer service.

When the opportunity at Zimplot arose, I was drawn to their long-standing reputation in the industry and their commitment to innovation. The Mining and Infrastructure division stood out to me because of its significant impact, not just within the company but also on the broader sector—especially in a country like Zimbabwe, where mining plays a crucial role in the economy. Leading this division felt like the perfect opportunity to apply my expertise in a more strategic, high-level role, where I could not only drive growth but also contribute to shaping the future of the industry.

Through a combination of mentorship, hands-on experience, and a passion for the sector, I was able to step into the leadership role at Zimplot. It has been

incredibly rewarding to lead a team dedicated to offering the best in mining and infrastructure solutions. It's all about delivering value—both to the customers and the business—and that's what continues to motivate me.

Q: How has the transition from Barzem to Tractive Power Solutions (TPS) impacted your operations, and what early results can you share since the acquisition? With a stronger focus on mining and infrastructure, how is TPS positioning itself to meet the growing demands in these sectors?

A: The transition from Barzem to Tractive Power Solutions (TPS) has brought significant improvements in operations, allowing TPS to offer a broader range of cutting-edge equipment solutions. Early results show increased demand, particularly in the mining sector, due to enhanced customer service, efficient products, and streamlined operations. TPS is positioning itself to meet the growing demands of mining and infrastructure by focusing on energy-efficient, cost-reducing, and environmentally sustainable equipment solutions. Additionally, the company is strengthening partnerships through tailored services, training, and long-term support to help clients achieve their operational goals.

Q: What have been the key challenges in servicing the mining sector, and how is TPS overcoming these obstacles to ensure smooth operations?

A: Some of the challenges in servicing the mining sector include the demand for specialized equipment, operational downtime, and cost efficiency. The company overcomes these obstacles by strengthening its supply chain, offering durable products, providing ongoing maintenance and training, ensuring compliance with safety standards, and delivering energy-efficient, cost-effective solutions to minimize downtime and support productivity.

Q: Mining equipment maintenance and support are critical for the success of mining companies. Minimizing downtime and cutting costs is key. How has Zimplot managed to deliver on after-sales service, and what challenges do you face in ensuring the reliability of your technical support services?

A: Zimplot delivers strong after-sales service by offering comprehensive maintenance programs, technical expertise, and training. Challenges include supply chain disruptions and cost pressures—mining companies often operate under tight budget constraints and may hesitate to invest in regular maintenance. Zimplot addresses these by expanding its service reach, investing in technician training, and offering flexible service contracts to ensure reliable, efficient support for mining operations.

Q: Zimbabwe seems to be lagging in terms of automation. What is Zimplot doing to ensure the country catches up with technology that will potentially boost output?

A: Zimplot recognizes the growing importance of automation in the mining and agriculture sectors and is taking proactive steps to ensure Zimbabwe stays competitive and benefits from technological advancements. Here's what Zimplot is doing to catch up with automation trends:

- Investment in Technology
- Training and Development
- Customized Automation Solutions
- Promoting Digitalization

Q: Given your expertise in supply chain dynamics, how is TPS leveraging its supply chain strengths to support the mining sector, and what challenges remain?

A: TPS leverages its supply chain strengths in the mining sector by forming strong supplier partnerships. Our investment in logistics ensures timely deliveries, and we always strive to minimize disruptions. However, challenges include the logistical difficulties of remote locations, global supply chain disruptions, customs delays, and rising transportation costs. TPS addresses these by diversifying suppliers, streamlining import processes, and offering cost-effective solutions to meet the needs of mining companies.

Q: In today's world, sustainability is crucial for mining operations. How does Zimplotw integrate sustainable practices into its offerings, and what role does your team play in promoting responsible mining through equipment and services?

A: Zimplotw integrates sustainability into its offerings by focusing on solutions that reduce environmental impact, enhance resource efficiency, and support responsible mining practices. Here's how:

Energy-Efficient Equipment: Zimplotw offers mining equipment designed to be more fuel-efficient, reducing both operational costs and carbon emissions.

Sustainable Mining Practices: The company promotes equipment that is built for durability and efficiency, minimizing the need for frequent replacements and reducing waste. This focus on long-lasting products aligns with sustainable mining practices.

After-Sales Service with a Sustainability

Focus: Zimplotw's after-sales services include regular maintenance and technical support that help optimize the performance of mining equipment, further enhancing fuel efficiency and reducing unnecessary environmental impact.

Overall, Zimplotw integrates sustainability through energy-efficient, durable equipment and services that support responsible mining operations. The team promotes these practices by providing the right tools and services to help mining companies operate more sustainably.

Q: What are the short-term and long-term goals for TPS within the mining sector, and how do you plan to achieve them in the next 1-3 years and beyond?

Short-Term Goals (1-3 Years):

Enhance Product and Service Offerings: TPS aims to expand its portfolio of mining equipment and automation solutions to meet the growing demands of the sector.

Improve After-Sales Support: A key goal is to strengthen after-sales services, particularly by improving the availability of spare parts and mobile service units. TPS will focus on expanding its service network and enhancing technical support to minimize equipment downtime and optimize client productivity.

Increase Market Share: In the short term, TPS is focused on growing its market share in the mining sector by establishing itself as a trusted partner for mining companies.

Long-Term Goals (Beyond 3 Years):

Full Integration of Automation and Digitalization: TPS aims to be a leader in the integration of automation and digital solutions for the mining sector. This

includes offering smart, connected equipment that allows for remote monitoring, predictive maintenance, and better resource management.

Sustainability Leadership: TPS is committed to helping mining companies reduce their environmental footprint. Over the long term, the company plans to continuously offer more sustainable equipment options, such as lower-emission machinery and energy-efficient technologies. This aligns with global trends toward greener mining practices.

Q: Words of advice to Thelma, who aspires to be like you?

A: Stay curious and never stop learning. Building expertise takes time, but a willingness to adapt, listen, and ask questions can go a long way. Also, remember that relationships and trust are key in any field. Don't hesitate to step out of your comfort zone and embrace new challenges—that's where growth happens, and there's a lot out there!

Q: Besides work, what is Glen into?

A: I love spending time with my wife and three children, and I'm really into rugby. It's a huge passion of mine. The team dynamics and strategy behind the sport are similar to how one conducts themselves in business. I firmly believe in teamwork and leading by example—that's what really excites me. It's also a great way to stay active and connected with friends.



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Zimbabwe's PGM sector and emerging players in the Industry

Zimbabwe's Platinum Group Metals (PGMs) sector is experiencing significant growth, with established players and new entrants making bold strides to position the country as a key player in the global PGM supply chain. Despite challenges posed by fluctuating global metal prices, geopolitical instability, and funding hurdles, the industry has shown resilience and continues to attract substantial investment, **Mining Zimbabwe can report.**



Association of Mine Surveyors of Zimbabwe (AMSZ) members on a tour of Unki Mine in Shurugwi, Zimbabwe. Image Mining Zimbabwe

In this evolving landscape, companies like Karo Resources, Bravura, Kuvimba Mining House, and industry giants such as Zimplats, Mimosa, and Unki are leading the way, pushing forward with new projects and expansions that will shape the future of Zimbabwe's PGM sector.

By Rudairo Mapuranga

Karo Resources: Advancing Despite Funding Challenges One of the most significant developments in Zimbabwe's PGM industry is the Karo Resources project, a \$4.2 billion platinum mining venture located on the Great Dyke in Mhondoro-Ngezi. Karo Resources, a subsidiary of Tharisa plc, broke ground on the Karo Platinum mine in 2022, with the goal of producing 194,000 ounces of PGMs annually. Once fully operational, this project will become the third-largest platinum operation in the country, following Zimplats and Mimosa. The project is expected to contribute significantly to Zimbabwe's overall platinum output, boosting production by around 20%.

However, the journey has not been without its obstacles. Tharisa announced in late 2024 that the commissioning of the Karo mine had been delayed to June 2025,

largely due to a sharp decline in PGM prices, which fell from an average of \$1,893 per ounce in 2023 to \$1,370 by the fourth quarter of 2024. The global market downturn forced the company to reassess its capital deployment and adjust its timelines. Despite these challenges, Phoevos Pouroulis, the CEO of Tharisa, remains optimistic, stating, "We remain bullish on the long-term fundamentals of the PGM market," and reaffirming the company's commitment to the project.

Karo Resources continues to forge ahead, with construction ongoing and efforts to optimize the project's development in line with available funding. Pouroulis emphasized the company's belief in the future demand for PGMs, driven by industrial applications and the transition to hydrogen fuel cell technology, which relies heavily on platinum. While the short-term outlook may appear uncertain, Karo Resources' continued progress signals confidence in the long-term viability of Zimbabwe's PGM sector.

Bravura: Forging Ahead with Selous Platinum Project

Another emerging player in Zimbabwe's PGM sector is Bravura, a company backed by Nigerian billionaire Benedict Peters,

which is developing the Selous Platinum Project. Situated in the heart of the Great Dyke, the Selous project is expected to become a major contributor to Zimbabwe's PGM output, with early exploration results indicating a potential 35-year life of mine.

Bravura has already made significant strides, with equipment being brought on-site to begin the box cut, the first step in developing an open-pit mine. Despite the progress, Bravura faces its own set of challenges, including securing the necessary funding to move the project forward in a volatile global economic environment. Nonetheless, the company remains committed to pushing ahead, with plans to position Selous as a key player in Zimbabwe's PGM industry.

The Selous Platinum Project is expected to bolster Zimbabwe's platinum production and add another layer of resilience to the country's mining sector. With a projected life of 35 years, the mine will play a critical role in sustaining Zimbabwe's role as a leading PGM producer in the global market.

Kuvimba Mining House: Great Dyke Investment Seeks Partners

The Great Dyke Investment (GDI), owned by Kuvimba Mining House, represents another cornerstone of Zimbabwe's PGM ambitions. However, the project has faced significant setbacks following the departure of its Russian partner, Vi Holding, due to the ongoing Russo-Ukrainian war. The political and economic fallout from the conflict forced the Russian investor to pull out, leaving Kuvimba Mining House in search of new investment partners.

The Great Dyke project is a massive undertaking, with the potential to produce 860,000 ounces of PGMs per year, making it one of the largest platinum projects in Zimbabwe. Without a key investor to help finance the development, however, the project's future hangs in the balance. Kuvimba Mining House has been actively scouting for new partners, seeking investors who can provide the financial backing needed to move the project forward. The company remains optimistic that a new partner will be found, allowing the Great Dyke Investment to proceed as planned and play a crucial role in boosting Zimbabwe's platinum output.

Established Giants: Zimplats, Mimosa, and Unki Push Ahead

While emerging players like Karo Resources, Bravura, and Kuvimba navigate funding challenges and geopolitical uncertainties, Zimbabwe's established PGM producers continue to expand and invest despite softening commodity prices.

Zimplats, the country's largest platinum producer, remains a stalwart of Zimbabwe's mining industry. The company is pushing ahead with its multi-billion-dollar capital projects, including the construction of a base metal

refinery and ongoing exploration efforts aimed at extending the mine's life. In 2024, Zimplats produced over 240,000 ounces of PGMs, maintaining its position as a leading player in the global platinum market. Despite the decline in PGM prices, Zimplats continues to invest in infrastructure and technology, ensuring that it remains competitive in the long term.

Mimosa Mining Company, a joint venture between Sibanye-Stillwater and Impala Platinum Holdings (Implats), also reported strong production gains in 2024. The company achieved an 8% year-on-year increase in 4E PGM production, reaching 31,408 ounces for the third quarter of the year. These gains were largely attributed to plant optimization efforts and efficiency improvements that have positioned Mimosa as one of the lowest-cost PGM producers globally. Despite inflationary pressures and declining metal prices, Mimosa has managed to maintain profitability by keeping operating costs in check and implementing cost-saving measures.

Meanwhile, Unki Mine, owned by Anglo American Platinum, continues to invest in its Zimbabwean operations, focusing on enhancing production and extending the life of its platinum assets. Unki has been a reliable contributor to Zimbabwe's PGM output, producing 88,000 ounces of PGMs in 2024, and the company is optimistic about future growth despite the challenging market conditions. Unki's commitment to sustainability and operational efficiency has positioned the mine as a key player in Zimbabwe's platinum sector, and the company is well-placed to benefit from any future recovery in PGM prices.

The Challenges of PGM Market Volatility

One of the biggest challenges facing

Zimbabwe's PGM sector is the volatility of global PGM prices. The price of platinum, in particular, has been under pressure due to concerns over the European Union's plans to phase out conventional vehicles, which would reduce demand for platinum and palladium, key materials used in catalytic converters. In 2024, PGM prices fell by nearly 28%, leading many companies to scale back their capital expenditure and delay key projects.

However, the long-term outlook for PGMs remains positive, particularly with the growing interest in hydrogen fuel cell technology, which relies heavily on platinum. As industries transition to greener technologies, the demand for PGMs is expected to rebound, creating new opportunities for Zimbabwe's mining sector.

The Future of Zimbabwe's PGM Sector

Zimbabwe's PGM sector remains a cornerstone of the country's economy, contributing significantly to foreign exchange earnings, employment, and economic development. With established giants like Zimplats, Mimosa, and Unki continuing to invest in their operations, and emerging players like Karo Resources, Bravura, and Kuvimba Mining House forging ahead with new projects, Zimbabwe is well-positioned to maintain its status as a leading global PGM producer.

While challenges such as funding shortages, geopolitical instability, and fluctuating commodity prices persist, the industry's resilience and commitment to long-term growth remain strong. As global demand for PGMs rebounds and new technologies emerge, Zimbabwe's PGM sector is poised to capitalize on these opportunities, ensuring that it remains a key player in the global market for years to come.



Main decline, Mupani Mine, ZIMPLATS



Wedza ramp, Mimosa Mine

Key Mining Projects Driving Zimbabwe's Growth in 2024



The headgear at Blanket Mine in Gwanda, Zimbabwe. image Mining Zimbabwe

As we move into 2025, Zimbabwe's mining sector is set for a year of immense activity, driven by major investments across a variety of minerals, including gold, platinum, lithium, ferrochrome, coal, oil, and diamonds. Following significant developments in 2024, these projects will continue to shape the future of the country's economy, offering substantial opportunities for local and international stakeholders.

By Rudairo Mapuranga

This article delves into some of the most crucial mining projects that are driving Zimbabwe's economic progress and highlights the potential impacts they will have in 2025.

Gold Projects

Caledonia Mining Corporation: Bilboes Gold Project

The Bilboes Gold Project remains a pivotal asset for Caledonia Mining Corporation, which has continued to advance its

development since acquiring the project in 2022. Bilboes holds over 2.56 million ounces of gold, making it one of Zimbabwe's largest gold resources. In 2025, Caledonia is set to ramp up production at Bilboes to an annual target of 168,000 ounces, which will significantly contribute to the nation's gold output. The US\$250 million investment will also generate substantial foreign currency revenue and boost employment in the Matabeleland North region.

Pickstone Peerless Gold Mine (Owned by Dallaglio, a subsidiary of Padenga Holdings)

The Pickstone Peerless Gold Mine, managed by Dallaglio Investments, has transitioned to underground mining with an investment of US\$28 million to improve its infrastructure. In 2025, the mine is expected to produce 60,000 ounces of gold annually, ensuring steady output

from the Chegutu-based mine. This expansion marks a significant step in sustaining Zimbabwe's gold production while contributing to local economic growth.

Eureka Gold Mine

Eureka Gold Mine, also owned by Padenga Holdings' Dallaglio, is set to increase its gold production in 2025 to 20,000 ounces annually after successful operational upgrades. The mine's performance is critical for Zimbabwe's northern region, bringing jobs and improving infrastructure in Gurue. With its growing output, Eureka will help meet Zimbabwe's national target of 100 tonnes of gold annually by 2030.

Platinum Group Metals (PGMs) Projects

Karo Platinum Project

In 2025, Tharisa plc continues to push ahead with the Karo Platinum Project on the Great Dyke, despite challenging global PGM prices. The project is expected to produce 194,000 ounces of PGMs annually once operational. Karo's ongoing development has seen US\$131 million invested, and production is now expected to commence in June 2025. The project will have a transformative effect on the local economy, creating jobs and increasing Zimbabwe's PGM exports.

These projects will continue to shape the future of the country's economy, offering substantial opportunities for local and international stakeholders.

Mimosa Mining Company

Mimosa Mining Company, a joint venture between Sibanye-Stillwater and Impala Platinum, remains one of Zimbabwe's top PGM

producers, with an annual output of 255,000 ounces. In 2025, Mimosa continues to improve efficiency following a US\$75 million investment in a new Tailings Storage Facility (TSF). The company's ongoing technological advancements and cost management strategies have positioned it as one of the lowest-cost PGM producers in the world.

Zimplats Expansion Projects

In 2025, Zimplats remains Zimbabwe's largest platinum producer, contributing over 500,000 ounces annually. Zimplats is progressing with its US\$1.8 billion expansion program, which includes



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developing new underground mines and advancing its base metal refinery. The refinery will allow Zimbabwe to process platinum domestically, enhancing the country's share in the global platinum value chain. This ambitious project is expected to boost Zimbabwe's PGM production and further solidify its position as a top producer.

Unki Mine

Unki Mine, owned by Anglo American Platinum, continues to produce 180,000 ounces of PGMs annually. In 2025, Unki is focusing on expanding its operations and improving community engagement. With sustainability at its core, Unki remains one of Zimbabwe's most responsible operators, contributing significantly to both the national economy and local communities.

High Carbon Ferrochrome and Steel Projects

Dinson Iron and Steel Company

Dinson Iron and Steel Company, led by Tsingshan Holdings Group, continues to develop the largest steel project in Africa in 2025. The Manhize Steel Plant, with a projected investment of US\$1.5 billion, will produce 1.2 million tonnes of steel annually once operational. This steel plant will significantly reduce Zimbabwe's reliance on imports and create thousands of jobs in the Manhize area. The project is scheduled to start production in the second half of 2025.

Zimasco Expansion Project

Zimasco is expanding its ferrochrome operations with a US\$300 million investment to boost production by 40% at its Kwekwe smelter. This expansion, in partnership with Shunfa New Materials, will enable Zimasco to increase output and cater to rising demand in both local and

international markets. By 2025, Zimasco is set to position itself as a leading ferrochrome producer in Africa.

ZimAlloys Furnace Refurbishment

In 2025, ZimAlloys will complete the refurbishment of its A3 Furnace, which will increase ferrochrome production to 120,000 tonnes annually. This investment in modernizing its smelting operations is crucial for ZimAlloys' strategy to capture more of the ferrochrome market and contribute to Zimbabwe's growing mining sector.

Lithium Projects

Prospect Lithium Zimbabwe (Arcadia Lithium Mine)

Prospect Lithium Zimbabwe's Arcadia Mine commissioned Africa's biggest hard rock lithium processing plant, which processes 4.5 million tonnes of lithium ore per annum and is set to produce 4.5 million tonnes of lithium concentrates annually. The Arcadia Mine, which is focused on battery-grade lithium, will play a pivotal role in Zimbabwe's strategy to become a key supplier of lithium for electric vehicles (EVs) and renewable energy storage systems. With global demand for lithium on the rise, the US\$700 million investment into Arcadia will position Zimbabwe as a top lithium producer.

Sinomine's Bikita Minerals

Bikita Minerals, under Sinomine Resource Group, will invest US\$500 million in its lithium smelter in 2025. Bikita, one of the oldest lithium producers in Zimbabwe, will be capable of producing battery-grade lithium, contributing to Zimbabwe's goal of becoming a key player in the global lithium supply chain. Despite price fluctuations, Bikita Minerals remains an

essential asset for Zimbabwe's mining sector.

Kamativi Lithium Mine

The Kamativi Lithium Mine is expected to begin full-scale production of battery-grade lithium carbonate by mid-2025. Following a US\$500 million investment, Kamativi's production will exceed 2 million tonnes of lithium ore annually, making it one of the largest lithium producers in Zimbabwe. This project will also create jobs and enhance infrastructure development in Matabeleland North.

Sabi Star Lithium Project

In 2025, the Sabi Star Lithium Project, owned by Max Mind Investments, will start production of over 20,000 tonnes of lithium concentrate annually. The project's new power plant, which is nearing completion, will support mining and processing operations, ensuring consistent output for the growing EV battery market.

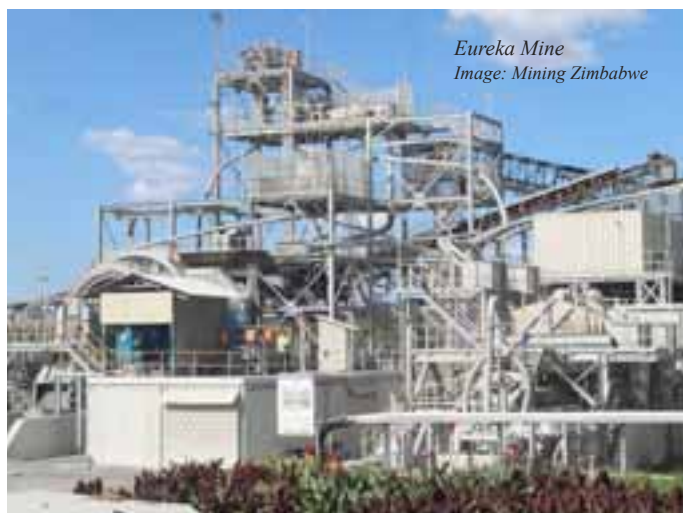
Sandawana Mine (Kuvimba Mining House)

Sandawana Mine, owned by Kuvimba Mining House, is set to produce over 500,000 tonnes of high-grade lithium concentrate at full capacity, positioning it as one of Zimbabwe's largest lithium mines. The project is crucial for Zimbabwe's ambitions to become a top lithium supplier in the global market.

Coal Projects

Zimbabwe's coal industry continues to experience significant growth, with key projects in Matabeleland North driving the sector forward. In 2025, these projects are set to increase coal output and contribute to the country's energy and industrial growth.

Continued on page 50>>



*Eureka Mine
Image: Mining Zimbabwe*



*Prospect Lithium
Image: Mining Zimbabwe*



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Hwange Colliery Company Limited (HCCL)

Hwange Colliery Company Limited is targeting a production of 4 million tonnes of coal in 2025, up from 2024 levels. The company's ongoing efforts include resuscitating its coke battery, which will have a capacity of 216,000 tonnes of coke per year. HCCL's underground mine at 3 Main North is also expected to begin coking coal production in early 2025.

Dinson Colliery

Dinson Colliery is one of Zimbabwe's largest coking coal producers, with an expected production of 600,000 tonnes of coke in 2025. The company has plans to expand its capacity further with two new coke oven batteries, each producing an additional 200,000 tonnes of coke annually.

Zambezi Gas and Coal Company

Zambezi Gas and Coal Company is targeting a production of 2.4 million tonnes of coal in 2025, focusing on both thermal and coking coal. The company's expansion efforts include ramping up production at its western area to reach 100,000 tonnes per month. With rising demand for coking coal and thermal coal from regional markets, Zambezi Gas is set to be a significant contributor to Zimbabwe's coal industry.

Zimbabwe Zhongxin Coking Company (ZZCC)

ZZCC has ambitious plans for 2025, with the construction of two automated recovery coke batteries, each with a capacity of 600,000 tonnes per year. These new facilities are expected to be operational by mid-2025, making ZZCC the second-largest recovery coke plant in

Zimbabwe after Dinson Colliery. This expansion will boost the country's coking coal production and help meet both local and export demand.

Makomo Resources

Makomo Resources, Zimbabwe's largest private coal producer, is aiming for 3.6 million tonnes of coal production in 2025. After facing challenges in previous years, including low demand for thermal coal and spontaneous combustion of stockpiled coal, Makomo is shifting its focus towards underground mining for coking coal, which is in higher demand. The company is also exploring the possibility of setting up its own power plant to increase thermal coal consumption.

South Mining

South Mining is planning to produce 400,000 tonnes of coke in 2025 from its two coke batteries located at Madumabisa Village and Chaba. The company is also exploring new partnerships to build a USD56 million gas power plant to utilize excess coke oven gas for flame stabilization at Zimbabwe Power Company's power stations. South Mining's expansion is vital for ensuring a stable supply of coking coal for Zimbabwe's metallurgical industries.

Zhongjin Heli Energy

In 2025, Zhongjin Heli Energy is continuing construction of its 300 MW thermal power plant in Matabeleland North. The project, which will be completed in three phases, is being developed with a USD400 million investment. Once operational, the plant will supply electricity to the national grid, reducing Zimbabwe's reliance on imported electricity and creating a stable market for domestic coal producers like Zambezi Gas.

Oil and Gas Exploration

Invictus Energy: Cabora Bassa Project

As oil and gas exploration continues at the Cabora Bassa Project, Invictus Energy is optimistic about the potential for commercial oil and gas production in Zimbabwe. Following promising drilling results in 2024, the company has allocated USD30 million for further exploration in 2025. If successful, the project could establish Zimbabwe as a new oil and gas producer, reducing the country's reliance on energy imports and creating new revenue streams through exports.

Diamond Projects

Zimbabwe Consolidated Diamond Company (ZCDC)

The Zimbabwe Consolidated Diamond Company (ZCDC) has set an ambitious target to produce 10 million carats of diamonds annually by 2025, up from 4.5 million carats in 2023. The company is focusing on increasing exploration efforts and expanding mining operations across its diamond concessions. This growth will significantly boost Zimbabwe's diamond exports, contributing to foreign currency earnings and strengthening the economy.

Alrosa's Diamond Exploration

In 2025, Alrosa, the world's largest diamond producer, is set to expand its operations in Zimbabwe following the discovery of 22 new diamond deposits. These discoveries, located mainly in Manicaland, have substantial commercial potential, and Alrosa is expected to start mining in some of these areas by mid-2025. The company's expansion into Zimbabwe is part of its strategy to diversify its diamond sources and increase its global market share.



Minister Chitando on a Mine tour at Dinson



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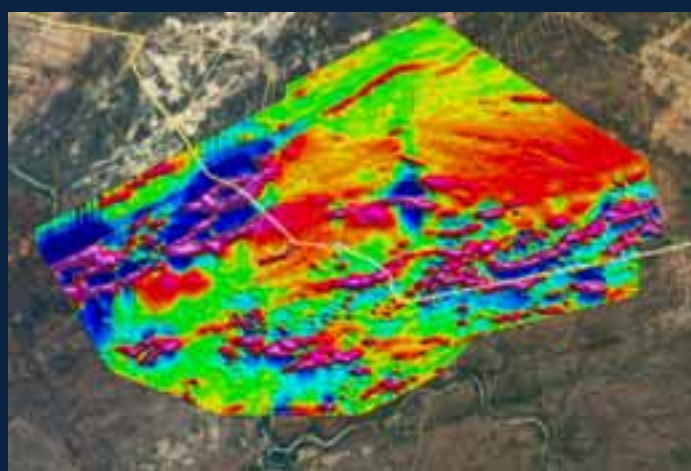
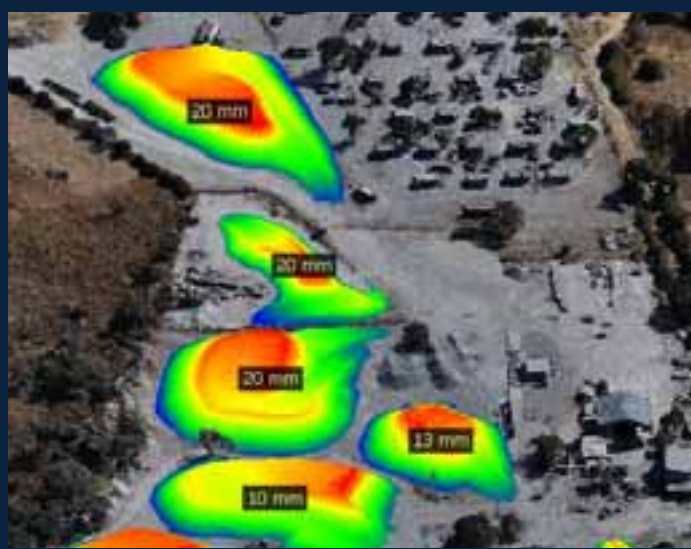
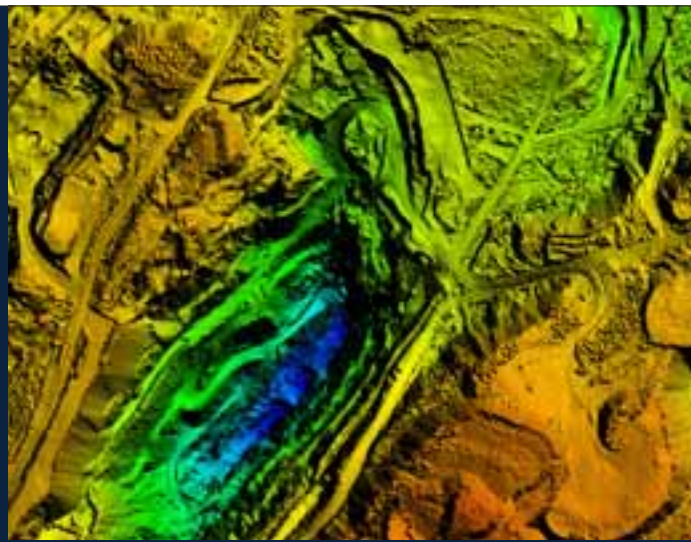
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Zimbabwe's Fully Operational Diamond Companies in 2025

Zimbabwe's diamond industry continues to play a pivotal role in the nation's economic development, with two major companies, Zimbabwe Consolidated Diamond Company (ZCDC) and Anjin Investments, leading the charge in 2025, Mining Zimbabwe can report.



A Beautiful diamond ring

Under the country's diamond policy, only four mining companies are allowed to operate in Zimbabwe's diamond sector: ZCDC, Anjin, Murowa, and Alrosa Zimbabwe.

By Rudairo Mapuranga

However, any other player looking to enter the market must form a joint venture with one of these four.

With Murowa currently facing internal challenges and Alrosa Zimbabwe still in the exploration phase, ZCDC and Anjin remain the driving forces behind Zimbabwe's diamond production. Their commitment to responsible mining, coupled with ongoing exploration efforts and corporate social responsibility (CSR) initiatives, ensures they remain key players in Zimbabwe's diamond landscape.

Zimbabwe Consolidated Diamond Company (ZCDC)

As a wholly-owned government entity under the Mutapa Investment Fund, ZCDC continues to thrive as the largest diamond mining company in Zimbabwe. In 2025, the company remains focused on expanding its mining operations at its two primary sites in Chiadzwa and Chimanimani. While Chiadzwa remains ZCDC's core production

center, trial mining at the Chimanimani project is progressing well, with full production expected to commence later in 2025. Both sites are rich in conglomerate diamond deposits, and ongoing exploration aims to significantly expand the company's resource base.

At Chiadzwa, ZCDC's mining operations cover an area of 1,048 hectares and are based on open-cast mining methods. These methods, combined with concurrent rehabilitation efforts, ensure that environmental impact is minimized while maximizing efficiency. In 2025, ZCDC is looking to increase its diamond production through investments in cutting-edge technologies such as a deep boiling plant and diamond de-coating research in collaboration with the Scientific and Industrial Research and Development Centre (SIRDC). These advancements will help improve the quality of diamonds produced, especially from Chiadzwa, where about 12% of diamonds are of gem quality.

The Chimanimani project, on the other hand, is particularly exciting for ZCDC. Trial mining has shown that 50% of diamonds from Chimanimani are of gem quality, significantly higher than Chiadzwa. Full production at Chimanimani, set to begin this year, will strengthen ZCDC's overall output and bring much-needed investment

to the Manicaland region.

ZCDC has not only focused on production but has also made significant contributions to local communities. Through its CSR initiatives, the company has engaged in projects such as providing scholarships, building infrastructure, and supporting local agriculture by purchasing produce from surrounding communities. One of its most celebrated efforts is the Manica Diamonds football club, which plays in Zimbabwe's Premier Soccer League (PSL), bringing pride to the local area. ZCDC's CSR programs focus on community development and ensuring that locals benefit from the wealth beneath their feet.

Despite the overall decline in diamond prices, ZCDC remains optimistic, bolstered by its ongoing brownfield and greenfield exploration activities. The company's greenfield exploration in Wengezi and Mahusekwa has shown potential, particularly in kimberlite pipes. These exploration activities are critical to ensuring ZCDC remains competitive and sustainable in the long term.

Continued on page 53>>

Anjin Investments

Anjin Investments, a Chinese-owned diamond mining company, has played a crucial role in Zimbabwe's diamond industry since its return to Chiadzwa in 2020 after a hiatus from 2016. The company has faced numerous challenges over the years, including outdated equipment and vandalism during its years of inactivity. However, Anjin has been steadily recapitalizing and revitalizing its operations, ensuring that 2025 marks a year of renewed focus and growth.

The company's open-cast strip mining operations are currently focused on Portal D, where it has produced 260,000 carats as of late 2024. Anjin's ambitious target for 2025 is to produce 1 million carats, a significant increase from previous years. However, the company acknowledges that reaching this goal will require overcoming several obstacles, including equipment that has outlived its lifespan and a stripping ratio that continues to increase as mining progresses to deeper levels.

Despite these challenges, Anjin is actively exploring new mining sites, including Portal C and Portal B. Exploration results from Portal B indicate a proven reserve of 9.8 million tonnes of ore, giving Anjin a 10-year life of mine at a production rate of 1 million tonnes per year. This development bodes well for the company's long-term outlook, as it positions itself to ramp up production significantly.

Anjin has also invested in modernizing its fleet of excavators and dump trucks, with plans to acquire new equipment in 2025. This move is crucial to achieving the

company's production targets and offsetting rising operational costs. Despite operating at 50% capacity for much of 2024, Anjin's ability to adapt and overcome challenges has allowed it to remain competitive in Zimbabwe's diamond sector.

Challenges and Opportunities

Both ZCDC and Anjin face challenges that are common in the global diamond industry. The slump in diamond prices has affected revenues. Additionally, power shortages and load shedding continue to affect production, particularly in rural areas like Chiadzwa and Chimanimani. However, both companies are exploring ways to mitigate these issues, including investing in renewable energy sources like ZCDC's planned 10 MW solar farm.

Anjin, in particular, is also dealing with the influx of illegal miners due to the proximity of homesteads to the red zone in Chiadzwa. Despite these challenges, Anjin remains committed to increasing its production and contributing to Zimbabwe's diamond exports. The company is also working closely with the local community to improve safety and reduce the impact of illegal mining on its operations.

The Future of Zimbabwe's Diamond Industry

Zimbabwe's diamond policy, which allows only four companies (ZCDC, Anjin, Murowa, and Alrosa) to mine diamonds, ensures that the sector remains tightly controlled and focused on maximizing returns for the country. This policy also stipulates that any

new entrants into the diamond sector must form joint ventures with one of the four approved companies, ensuring that local stakeholders remain involved in all operations.

While Murowa Diamonds, owned by RioZim, is currently facing internal challenges that have affected production, and Alrosa Zimbabwe is still in the exploration phase, both ZCDC and Anjin are set to remain the main drivers of Zimbabwe's diamond production in 2025. With continued exploration efforts, including kimberlite discoveries and trial mining, Zimbabwe's diamond sector is poised for further growth.

As ZCDC and Anjin strengthen their operations, the long-term outlook for Zimbabwe's diamond industry remains positive. Despite global market fluctuations, the sector is well-positioned to continue contributing to the country's economic development, particularly through employment creation, foreign currency generation, and community development projects. With the support of the Zimbabwean government, which owns ZCDC through the Mutapa Investment Fund, the diamond industry is expected to thrive as a critical pillar of Zimbabwe's mining future.

As we look forward to 2025 and beyond, Zimbabwe's diamond sector will continue to evolve, with companies like ZCDC and Anjin leading the way towards sustainable and responsible diamond mining. Their commitment to growth, innovation, and community engagement ensures that Zimbabwe will remain a key player in the global diamond market for years to come.



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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 Location found in Zimbabwe

Jade	Masvingo		
Kaolin	Kwekwe, Mutare, Bubi, Hwange, Kadoma, Mazowe, Harare, Umzingwane, Nkayi, Chegutu		
Kainite	Hurungwe, Nyanga, Mudzi, Rushinga		
Lead	Mberengwa, Kwekwe, Gokwe, Mutare, Wedza, Hwange		
Limestone	Mberengwa, Gwanda, Bindura, Shamva, Mazowe, Kadoma, Umzingwane, Gweru, Chegutu, Chimanimani, Mudzi, Harare, Hurungwe		
Lithium	Goromonzi, Mudzi, Buhera, Bikita, Chegutu, Hwange, Harare, Insiza, Rushinga, Mutoko, Mutare, Hwange		
Magnetite	Gwanda, Nyanga, Kadoma, Mwenezi, Insiza, Buhera, Mberengwa, Beitbridge, Gweru		
Manganese	Kwekwe, Gweru, Makonde, Mberengwa		
Mercury	Bubi, Kadoma		
Mica	Hurungwe, Rushinga, Kariba, Hwange		
Molybdenum	Kwekwe, Insiza, Shurugwi, Makonde, Chipinge, Gweru, Mutare		
Mtorolite	Guruve, Mutare		
Nickel	Bubi, Makonde, Kwekwe, Insiza, Guruve, Shamva, Shurugwi, Matobo, Chegutu, Bindura, Gweru.		
Ochre	Gweru, Kwekwe		
Palladium	Kwekwe, Makonde, Shurugwi, Chegutu		
Phosphate	Buhera		
Platinum	Kwekwe, Makonde, Shurugwi, Chegutu, Centenary		
Pyrite	Shurugwi, Gwanda, Mazowe, Kadoma, 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

RAGNAROCK DRILLING (PVT) LTD

CONTACT: 0715616972 / 0773170592 / 0712684404



About Our Company

We were established in 2021 and we began our business with one rig. We have since expanded and have two rigs with a third on the way.

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CONTACT US

FAMS Freight Forwarding (Pvt) Ltd

107 Kelvin Road South, Graniteside, Harare, Zimbabwe

Tel: (+263) 867 700 7400, Email: info@fams-zimbabwe.com

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