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ISSUE  
**80**  
2025

**One-on-One with**  
Caledonia Mining CEO  
Mark Learmonth

## Bikita

Leads Zimbabwe's Beneficiation  
Drive with Groundbreaking  
Cesium Flotation Plant

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# Calling on all mines to help us demystify the “Mining is not doing anything for Zimbabwe” myth!



Keith Sungiso

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Welcome to the 80th edition of Mining Zimbabwe, the nation's premier mining industry publication.

This special issue coincides with one of the sector's most significant gatherings—the Chamber of Mines of Zimbabwe's Annual Mining Conference and Exhibition, taking place from May 21-24, 2025, in Victoria Falls.

This year's conference also marks the end of Mr. Thomas Gono's impactful tenure as President of the Chamber of Mines. We acknowledge his contributions in a dedicated feature in this issue.

As we publish this edition it presents a timely opportunity to reflect on both the economic and social impact of our industry.

A recurring concern raised across our platforms is the perception that Zimbabwe gains little to nothing from its mining activities. This narrative persists despite some Environmental, Social, and Governance (ESG) initiatives actively undertaken by many mining companies across the country.

Unfortunately, the true impact of these

initiatives is often lost in a sea of fragmented communication—isolated posts, brief mentions, and scattered images that fail to tell a cohesive story. As a result, the perception persists that Zimbabwe gains little from its mining sector.

Mining Zimbabwe is creating a unified, comprehensive showcase that brings these efforts into sharp focus. By compiling and presenting ESG achievements in one powerful edition, we can finally paint the full picture—demystifying the myth and revealing the tangible, often transformative, contributions mining is making to Zimbabwe's communities and economy.

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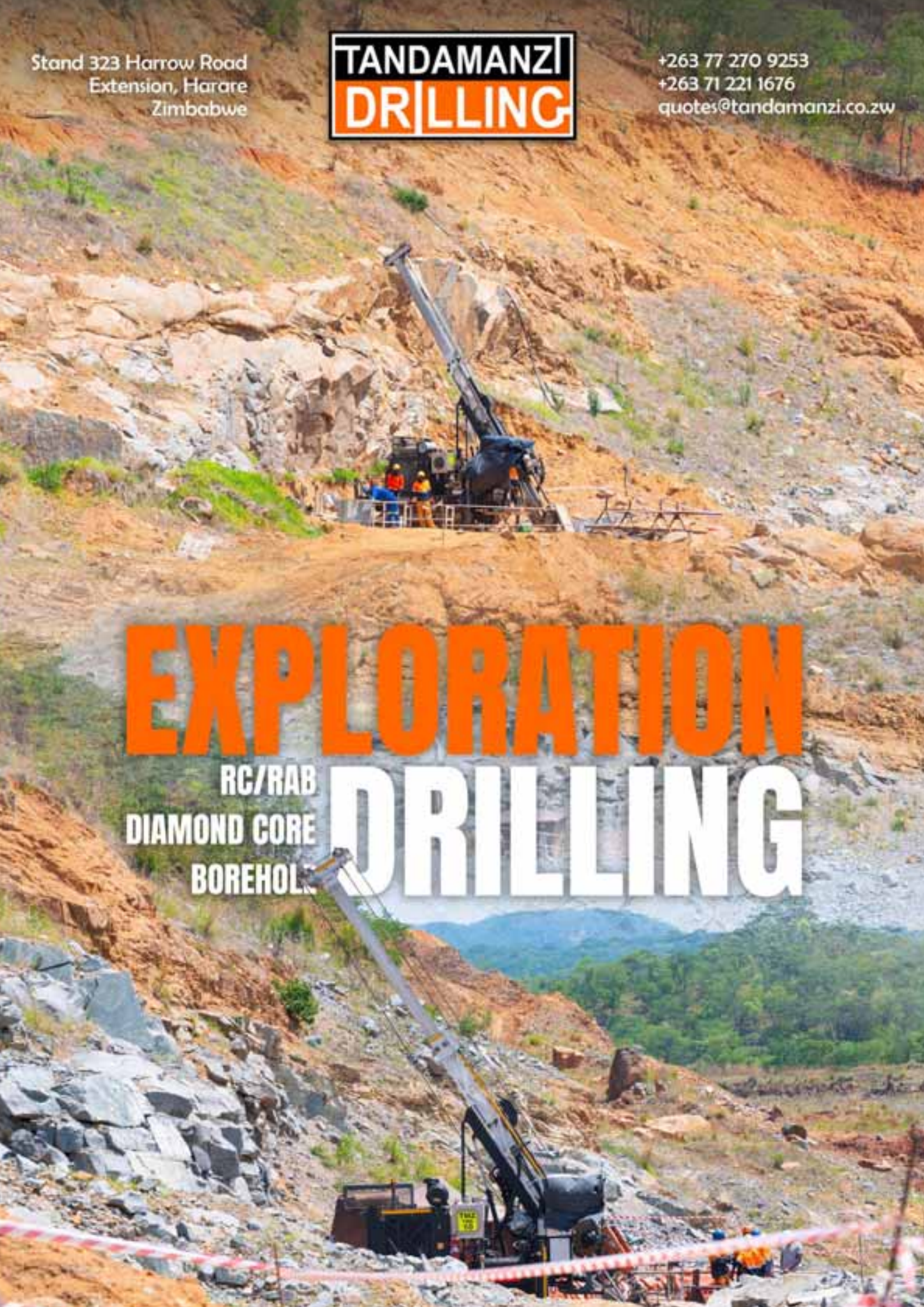
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# Thomas Gono

## reflects on tenure as Chamber of Mines President

As Zimbabwe's mining sector continues to evolve amid shifting global dynamics and growing calls for sustainability, the leadership of the Chamber of Mines plays a pivotal role in guiding the industry. In this exclusive interview, the outgoing President of the Chamber of Mines reflects on his two-year tenure, highlighting key achievements such as record export earnings, strengthened stakeholder relations, and progress in environmental, social, and governance (ESG) compliance.



CoMZ outgoing President Mr Thomas Gono

### What would you consider your most significant achievements during your tenure as President of the Chamber of Mines?

During the past 2 years that I have served as the Chamber President, the mining industry has achieved some key milestones that are a direct outcome of the collaborative effort between the Government and the Chamber. The industry celebrated record export earnings of US\$5.9 billion in 2024, despite a challenging commodity markets environment. We also managed to consolidate our improved relationship with key stakeholders including Parliament, Government and other key Government departments including RBZ, ZESA, and ZIMRA. Our engagements with ZESA has seen the mining industry being prioritized on the available scarce power. On the industry Labour front, there were enhanced engagements with the workers unions resulting in Labour relations harmony with no industrial action having been undertaken. We managed to work closely with the Government, and on most occasions, we were consulted during policy

and legislative formulation, and most importantly our key submissions were being considered. During the tenure, we also managed to set up the Chamber Centre of Excellence that is set to improve the delivery model of the Chamber with improved efficiency and wider range of products for our Members and Stakeholders. I am happy to have contributed to these achievements during my tenure.

### What were the biggest challenges you faced leading the Chamber, and how did you navigate them?

My tenure coincided with marked downturn in key minerals markets that resulted in prices for key commodities including PGMs and base metals taking a huge knock resulting in revenue losses. This situation happened at a time operating costs were going up, propped up by new taxes and increase in electricity tariffs. Resultantly, the viability of mining projects

during this period was severely compromised. As price takers, we had to engage Government and other

Departments including ZESA to assist in reducing the cost of production. Further worsening the situation was the widening disparities between the official and parallel market rate which also resulted in the loss of value on the surrender portion of export proceeds. Engaging RBZ for adequate forex and fair

compensation of the surrender portion was equally a big task. We, however, managed to achieve some positive outcomes including the review of the special capital gains tax framework, while most tax heads were maintained despite Government also facing significant revenue pressures during the period under review.

During the past 2 years that I have served as the **Chamber President**, the mining industry has achieved some key milestones that are a direct outcome of the collaborative effort between the **Government and the Chamber**.

Continued on page 9>>

### What role did the Chamber play in shaping discussions around responsible mining and environmental compliance during your term?

During my tenure, the Chamber adopted Environment, Social, and Governance (ESG) as one of our strategic priorities. In this regard, a scoping study for an ESG framework for the mining industry was undertaken, and an ESG Guidelines framework is being developed. The Chamber of Mines also undertook Safety, Health, and Environment audits that supported the continual improvement work of individual mines. These audits were conducted with the support of regulatory bodies such as EMA, SAZ, and the Ministry of Mines and Mining Development. The audited entities noted the value they received from participating in the audits.

### How did the Chamber address concerns around mine worker safety, wages, and labour rights during your presidency?

The Chamber of Mines, through the SHE Committee, undertook several initiatives to support mines in improving their SHE performance. In addition, the Chamber engaged the Ministry of Mines and shared information on fatal accidents. First Aid and Mine Rescue competitions were conducted to enhance the capacity of mines to respond to emergencies. On several occasions, the Mine Rescue Association of Zimbabwe provided support

to small mines in the rescue of miners trapped in underground operations.

### What progress, if any, was made toward improving beneficiation and value addition in the sector during your tenure?

The Chamber of Mines fully supports the Government's thrust of maximizing the contribution of the mining sector to the economy through increased beneficiation of the country's mineral resources. I am happy to report that the mining industry—specifically the PGMs sector—achieved key beneficiation milestones in the last year. The PGMs sector and the Government agreed on a beneficiation roadmap that will result in the country exporting a minimum of PGMs matte, with all concentrates being smelted in-country.

In line with this agreement, it is encouraging to report that the PGMs industry now has adequate smelting capacity, and all concentrates are now being processed locally. The lithium industry has also made significant progress. The Chamber successfully engaged the Government and agreed on a beneficiation roadmap for the lithium industry that will result in the production of lithium sulphate. Already, most lithium producers are investing in beneficiation facilities in line with the agreed timelines.

### What advice would you give to your successor to ensure continued growth

### and sustainability in Zimbabwe's mining industry?

The Chamber has developed a tradition of maintaining a close working relationship with our key stakeholders in improving the operating environment for the mining industry. Over the past years, this approach has significantly improved the operating environment, culminating in the growth of our mining sector. My advice to my successor is to work closely with the Chamber Secretariat and Committee Structures to consolidate and entrench this winning approach in achieving our strategic goals.

### Looking back, is there anything you wish you had done differently or any unfinished business you hope the next leadership will take forward?

The Chamber operates with a clearly defined strategy and operational plans that have clear deadlines. My feeling is that we have been working according to our plans and could not have done the job differently from the agreed plans.

### Where to from here?

I remain part of the Chamber family and, as Immediate Past President, I am still part of the Chamber leadership. I will continue to work closely with the new Presidium and the Chamber Secretariat, sharing my experiences during my tenure to achieve our objectives.

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# Zimbabwe Government Targets Stability, Growth and Investor Confidence



The Minister of Mines and Mining Development Hon Winston Chitando

**In an effort to ensure the mining industry in Zimbabwe becomes a pillar of sustainable economic growth and global competitiveness, the Ministry of Mines and Mining Development, under the leadership of Minister Winston Chitando, is implementing comprehensive reforms to address investor concerns, infrastructure deficits, beneficiation enforcement, and value chain development, Mining Zimbabwe can report.**

By Rudairo Mapuranga

Zimbabwe's mining sector, which accounts for more than 60% of the country's export earnings, has long been recognized as the bedrock of the national economy. However, persistent challenges such as bureaucratic inefficiencies, infrastructure bottlenecks, and global market volatility have necessitated a comprehensive recalibration of the country's mining policy framework.

In an exclusive interview with Mining Zimbabwe, Minister Chitando outlined his Ministry's strategies aimed at transforming Zimbabwe's mining landscape into an investor-friendly, transparent, and globally competitive sector.

At the core of Zimbabwe's mining sector revival is the creation of a predictable and investor-friendly policy environment. Minister Chitando emphasized that investor confidence is built on trust, certainty, and efficiency within the regulatory framework. He explained that his Ministry is prioritizing transparency and the removal of bureaucratic hurdles, with reforms aimed at guaranteeing the

security of tenure for investors.

A major focus of these reforms is the digitization of the entire licensing and permitting process. According to Chitando, this transition to electronic systems will ensure faster approvals, eliminate red tape, and significantly reduce opportunities for corruption. Equally important, the Ministry is refining the country's indigenization policies, seeking a balanced approach that encourages local ownership while still attracting the much-needed foreign direct investment.

"Investors require certainty and efficiency. These reforms are designed not only to streamline processes but also to anchor Zimbabwe as a credible mining investment destination," Minister Chitando said.

In line with the global shift towards green energy and critical minerals, Zimbabwe is positioning itself as a strategic player in the lithium, rare earths, and chrome sectors. With some of the world's largest lithium

reserves, Zimbabwe has already taken bold steps to ensure that this resource benefits the country. The ban on raw lithium exports, implemented in 2023, has compelled investors to establish local beneficiation plants, driving value addition and job creation within the country.

Chitando revealed that the government is actively engaging with international

technology firms and electric vehicle manufacturers to integrate

Zimbabwe into global supply chains. Incentives are being structured to support the establishment of lithium hydroxide and carbonate production facilities.

Furthermore, the country's untapped potential in rare earth elements is being

pursued through partnerships

aimed at diversifying global supply chains, while the chrome sector is receiving focused attention through mandates requiring investments in ferrochrome smelting.

**Hon Chitando outlined his Ministry's strategies aimed at transforming Zimbabwe's mining landscape into an investor-friendly, transparent, and globally competitive sector.**

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However, Chitando was quick to point out that value addition policies are being implemented pragmatically. Recognizing the challenges posed by fluctuating global commodity prices, he explained that the Ministry has adopted a phased approach to beneficiation.

"Value addition is non-negotiable, but we are sensitive to market realities. Hence, we are working with miners to ensure a balanced approach that safeguards both national interests and investor viability," Chitando noted.

Infrastructure development, particularly in the areas of energy, transport, and logistics, remains a critical enabler for Zimbabwe's mining sector growth. Chitando acknowledged the persistent challenges faced by miners due to inadequate infrastructure but emphasized that the government has a clear strategy to address these bottlenecks.

Energy security is at the top of the Ministry's agenda. One of the flagship projects is the 250MW floating solar plant on Lake Kariba, a collaborative venture with Zambia, funded by Afreximbank. Slated for completion by mid-2026, this renewable energy project is expected to provide a sustainable power source for the mining industry. In the short term, the government is stabilizing energy supply through coal-fired power stations, with the commissioning of Hwange Units 7 and 8 being key interventions.

Road and rail infrastructure are also receiving significant attention. Major highways such as the Harare-Beitbridge and Harare-Chirundu corridors are undergoing rehabilitation. In addition, the development of integrated logistics hubs near mining districts, such as the Manhize Steel Plant, is set to enhance the efficiency of mineral transportation and processing.

"Energy security and efficient logistics are essential enablers for mining growth. Through public-private partnerships, we are addressing these challenges head-on," he said.

Turning to the contentious issue of beneficiation enforcement, Chitando elaborated on the Ministry's phased and pragmatic approach. He acknowledged that while beneficiation is critical to maximizing the country's mineral wealth, it must be implemented in a manner that does not stifle operations. The lithium sector has already witnessed the imposition of a ban on raw exports,

compelling producers to process ore domestically. For platinum, however, the introduction of a 5% export tax on unrefined exports has been met with resistance from miners, who cite high refinery costs and unreliable power supply.

Chitando explained that the Ministry is not imposing abrupt mandates but is instead facilitating a gradual transition. The beneficiation roadmap begins with the production of concentrates, followed by a shift to higher-value products such as lithium carbonate and hydroxide, and ultimately aims for the manufacturing of battery components within Zimbabwe.

"Beneficiation is central to our economic strategy, but we are not blind to operational realities. Our phased model ensures that value addition is achieved in a sustainable and mutually beneficial manner," he said.

The streamlining of investment approvals has been another major focus of the Ministry's reform agenda. Historically, investors have expressed frustration over sluggish and cumbersome approval processes. Chitando outlined decisive steps being taken to address this challenge, including the implementation of the Mining Cadastre Information Management System, a centralized digital platform to manage mining rights, claims, and licenses.



Furthermore, the introduction of an online mineral export permit system is nearing completion. This system is designed to improve transparency, reduce processing times, and eliminate opportunities for corrupt practices. Chitando emphasized that fast-track approval processes are being instituted for strategic minerals and value-added projects.

"We are prioritizing strategic minerals such as lithium and platinum, ensuring

dedicated attention to expedite project approvals. Reducing bureaucracy is not a favour — it is an economic imperative," Chitando stated.

Beyond the focus on investors and policy reforms, Chitando underscored the government's commitment to mine workers and community development. He acknowledged that the mining sector's success ultimately rests on the skills and dedication of its workforce.

"Your skills and labour are the backbone of Zimbabwe's mining sector. Worker safety, fair wages, and job security remain top priorities," said Chitando.

To this end, the Ministry is expanding training programs aimed at upskilling workers for roles in mineral processing and advanced manufacturing. Stricter safety and labour standards are being enforced, particularly in the artisanal and small-scale mining sector, where vulnerabilities are most pronounced. Additionally, mandatory community development agreements are being introduced to ensure that mining activities translate into tangible benefits for local communities, including employment opportunities and infrastructure development.

Chitando urged collaboration between workers, unions, and mining companies, emphasizing that shared prosperity is achievable only through collective effort and mutual respect.

"We urge collaboration between workers, unions, and mining companies to ensure shared prosperity as the sector grows," he concluded.

Despite global economic headwinds, Zimbabwe's mining sector is poised for a transformative phase of growth and stability. The government's vision for the economy to become an upper-middle-income earner by 2030 is steadily progressing, with significant investments being made in lithium, gold, platinum, and steel production.

Chitando expressed unwavering optimism about the sector's future.

"Zimbabwe's mining sector is undergoing a transformative phase. With the right policies, infrastructure investments, and stakeholder collaboration, we are positioning ourselves as a key player in the global mining value chain. The opportunities are immense — for investors, workers, and the nation at large," he said.

# Bikita Leads Zimbabwe's Beneficiation Drive with Groundbreaking Cesium Flotation Plant

Sinomine-owned Bikita Minerals, in an effort to position Zimbabwe as a global hub for strategic minerals, has commenced trial operations at its pioneering Cesium Flotation Plant (CFP), a world-first production line designed to process cesium ore, Mining Zimbabwe can report.



This bold move, realized in May 2025, marks a new era for Bikita's beneficiation ambitions and is a crucial piece of a broader strategy that integrates multiple processing plants aimed at unlocking the full value of Zimbabwe's lithium-cesium-tantalum resources.

Located in Masvingo Province, Bikita Minerals has long been known for its lithium-rich pegmatite deposits. However, since Sinomine Resource Group's acquisition of the mine in February 2022, Bikita has been undergoing a complete transformation. No longer just a supplier of technical petalite, Bikita is now emerging as a diversified, vertically integrated mining complex, capable of delivering high-value products to global markets while driving socio-economic development in Zimbabwe.

At the heart of this transformation is a clear strategy: beneficiation at scale, driven by innovation, efficiency, and a commitment to sustainability. The Cesium Flotation Plant is not a standalone achievement but part of a comprehensive beneficiation infrastructure that includes the **Gravity Separation Plant (GSP)** and the **Spodumene Flotation Plant (SFP)**.

Together, these plants represent the most advanced processing complex of its kind in Africa.

## Bikita's Mineral Wealth: More Than Just Lithium

Bikita's significance extends beyond the lithium boom. Its pegmatite bodies host a rich mix of critical minerals, including lithium-bearing petalite, spodumene, lepidolite, amblygonite, eucryptite, and bikitaite, as well as pollucite for cesium and tantalite for tantalum. This diversity makes Bikita one of the most important Lithium-Cesium-Tantalum (LCT) pegmatite deposits globally.

Following its acquisition by Sinomine, the mine has seen a remarkable increase in its resource base. In less than two years, lithium ore resources jumped from 29.41 million tonnes to 113.35 million tonnes. Exploration continues, particularly in the northern zones of the deposit, and further growth in resources is anticipated. Such an abundant resource base justifies the significant investments in beneficiation infrastructure, aimed at adding value locally rather than exporting raw ore.

## The Gravity Separation Plant: Bikita's Beneficiation Backbone

The Gravity Separation Plant (GSP) forms

the backbone of Bikita's beneficiation operations. Designed to process two million tonnes of raw ore annually, the GSP delivers 300,000 tonnes of petalite concentrate per year. This plant combines legacy systems with modern enhancements, blending tried-and-tested methods with cutting-edge technology.

The Cesium Flotation Plant is not a standalone achievement but part of a comprehensive beneficiation infrastructure that includes the Gravity Separation Plant (GSP) and the Spodumene Flotation Plant (SFP).

At its core, the GSP relies on dense media separation (DMS), leveraging the differences in mineral densities to achieve effective separation. The plant's old system, which includes DMS1 and DMS2, DGP units, and optical sorters, has been complemented by a new system featuring additional crushing capacity and DMS circuits up to DMS7. This integration of old and new ensures that Bikita maintains high throughput while achieving exceptional recovery rates.

The result is a highly efficient plant capable of producing both technical and chemical-grade petalite.

## Spodumene Flotation Plant: Enhancing Lithium Recovery

While petalite has historically been Bikita's

primary lithium product, the development of the Spodumene Flotation Plant (SFP) reflects a strategic pivot to meet the growing demand for spodumene concentrate in the global battery industry. The SFP focuses on the recovery of spodumene, a high-demand lithium mineral essential for lithium-ion battery production.

The SFP process involves a series of carefully optimized steps, including milling, flotation, and thickening, supported by advanced reagent systems.

### **The Cesium Flotation Plant: A Global First from Zimbabwe**

The Cesium Flotation Plant (CFP) is undoubtedly Bikita's flagship innovation. As the world's first facility specifically designed to process low-grade cesium ore, the CFP represents a technological breakthrough with far-reaching implications for the global supply of this critical metal.

Cesium plays a vital role in a range of industries, from fine chemicals and oil drilling fluids to advanced defence and military applications. However, its rarity — with economically viable deposits limited to a handful of sites globally — has historically constrained supply. Sinomine's ownership of the Tanco Mine in Canada and the Bikita Mine in Zimbabwe places it in a unique position to meet this growing demand.

Importantly, the CFP is designed not just for cesium recovery but for the comprehensive beneficiation of all valuable minerals present in the feed material. This multi-mineral recovery approach maximizes resource utilization, delivering economic and environmental benefits.

With trial operations successfully launched in May 2025, the CFP positions Zimbabwe as a critical node in the global cesium supply chain, offering a new source of supply at a time when geopolitical and supply chain dynamics demand diversification.

### **Infrastructure Investments: Powering Sustainable Growth**

Bikita's beneficiation ambitions are underpinned by significant investments in supporting infrastructure. Recognizing that efficient beneficiation requires stable and sustainable power, Sinomine has invested in a new 132kV power

transmission line, connecting Masvingo to Bikita, Nyika, Zaka, and surrounding areas. This upgrade not only secures reliable power for Bikita Minerals' operations but also alleviates electricity shortages for local communities, contributing to broader regional development.

In parallel, the development of a 20MW photovoltaic (solar) power project underscores Sinomine's commitment to a low-carbon future. By integrating renewable energy into its power mix, Bikita reduces its dependence on fossil fuels, lowers operational costs, and aligns with global environmental sustainability goals.

### **Community Impact and ESG Excellence**

Beyond its operational achievements, Sinomine Bikita Minerals has made significant strides in environmental, social, and governance (ESG) performance. The company's community development initiatives reflect a deep commitment to shared value creation.

Through programs focused on water security, healthcare, infrastructure, and education, Bikita Minerals has tangibly improved the quality of life for surrounding communities. The installation of 36 boreholes has enhanced water access, while the construction and expansion of clinics have improved healthcare delivery. Road infrastructure upgrades have reduced dust, blast vibration, and noise impacts, enhancing community livability.

These efforts have been recognized through prestigious awards, including the ESG Green Champion Award 2024, the Responsible Mining & Clean Energy Champion Award, and the ESG Business Leadership Award for General Manager Gong Xuedong.

### **Navigating Challenges and Seizing Opportunities**

While Bikita's progress is remarkable, it has not been without challenges. Zimbabwe's underdeveloped power infrastructure, volatile fiscal and tax policies, high transport costs, and currency depreciation risks continue to pose operational and financial hurdles. Furthermore, sustained low lithium prices exert pressure on margins, necessitating relentless focus on cost control and efficiency.

Sinomine's strategic response is multifaceted. By continuously optimizing costs across mining and beneficiation, investing in technological innovation, and

diversifying its product portfolio to include not just lithium but also cesium, Bikita is building resilience against market fluctuations. The company's vision of an integrated mining-processing-smelting value chain further strengthens its long-term competitiveness.

At the same time, Bikita is deepening its partnerships with local government and communities, fostering a collaborative environment that supports sustainable development.

### **Zimbabwe at the Forefront of Beneficiation Excellence**

The commencement of trial operations at the Cesium Flotation Plant is more than a technical achievement for Bikita Minerals. It symbolizes a new chapter for Zimbabwe, demonstrating that with strategic investment, technological innovation, and a commitment to beneficiation, the country can move beyond raw material exports to become a value-added powerhouse in critical minerals.

Through the integration of the Gravity Separation Plant, Spodumene Flotation Plant, and now the groundbreaking Cesium Flotation Plant, Bikita is setting a new standard for beneficiation in Africa. This holistic approach not only maximizes the economic potential of its resource base but also delivers broad-based socio-economic benefits, from job creation to infrastructure development and environmental stewardship.

As global demand for critical minerals intensifies, Bikita stands ready to meet the challenge, positioning Zimbabwe as an essential player in the world's transition to a high-tech, low-carbon future. Under Sinomine's leadership, Bikita's beneficiation journey is not just a success story — it is a blueprint for the future of African.



# Gold and Coal Drive Zimbabwe Q1 Mining Growth as Chamber Forecasts 7% Surge in 2025

Zimbabwe's mining sector is poised for a robust rebound in 2025, with projected growth of around 7%, driven by outstanding performance in gold and coal mining, according to the Chamber of Mines of Zimbabwe (CoMZ).



Chamber of Mines of Zimbabwe (CoMZ) CEO Isaac Kwesu

By Ryan Chigoche

The upbeat outlook comes as global commodity markets remain favourable and domestic production ramps up, particularly in high-value segments.

Speaking in the run-up to the Chamber's Annual Mining Conference and Exhibition, CEO Isaac Kwesu said the fundamentals are strong in the country's two leading mineral sectors—gold and coal—which are set to underpin export earnings and overall economic performance.

"I think we have the key miners, such as gold and coal, performing very well. The stellar performance from gold, I think it was above 35% growth. And with the price of gold firming, I think, again, we anticipate seeing gold driving the export performance of the mining industry," said Kwesu.

Gold, long regarded as Zimbabwe's flagship mineral, continues to shine on both output and pricing fronts.

Analysts attribute its surge to improved artisanal and small-scale gold production, increased formalisation efforts, and rising prices on the global market amid geopolitical uncertainty and investor demand for safe-haven assets.

The sector's impact on national trade

figures is increasingly evident.

"We have seen gold, in terms of the concentration ratio, moving from an average of 25—I think now it's almost above 40%—which is a sign that Zimbabwe, just like others, is benefiting from the gold endowment in terms of foreign exchange earnings," Kwesu noted.

Meanwhile, coal output has also soared, rising by as much as 61% in the first quarter of the year, driven by expanded activity in Hwange and other energy projects aimed at addressing Zimbabwe's electricity deficit.

The surge in coal production has repositioned it from a marginal contributor to a mineral of growing national importance.

"The coal, I think it was also up as much as 61%, which means its weight used to be about 5% of the national mining output. Possibly, we may see it also surging above double digits, because there's a lot of activity in the coal [sector]," he added.

Other minerals, such as platinum group metals (PGMs), chrome, and base metals, experienced a slower start to the year, largely due to subdued international prices and operational constraints. However, Kwesu remains confident that the second half of 2025 will bring a turnaround, saying,

"...So the overall growth outlook remains positive."

The Chamber's forecast of around 7% growth in both output volume and value aligns with broader government goals to transform mining into a US\$12 billion industry.

The sector, which contributes over 60% of Zimbabwe's export earnings, remains central to economic recovery and foreign currency generation.

This positive outlook sets the tone for the 2025 Chamber of Mines AGM and Conference, which will run from May 21 to 24 at Elephant Hills Resort in Victoria Falls.

The event will convene government officials, mining executives, investors, and industry experts under the theme: "Unlocking Growth Potential for the Zimbabwe Mining Industry."

Key agenda items will include mineral-specific symposiums, investment opportunities, policy reforms, infrastructure development, and sustainable mining practices. With gold and coal now leading the charge, stakeholders will be keen to explore how to leverage this momentum across the rest of the sector.



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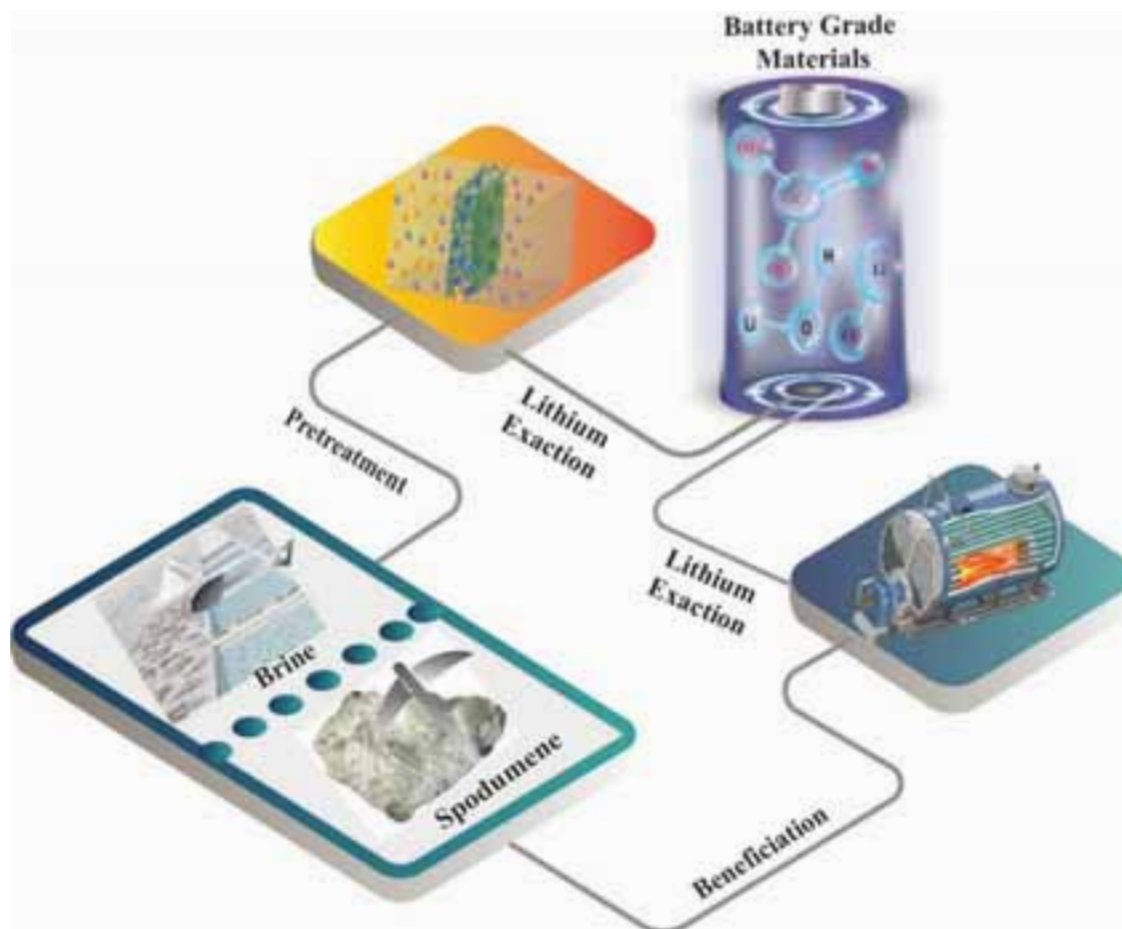
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# Beneficiation: Zimbabwe's Upcoming Lithium, PGM, and Coal-to-Energy Projects Take Shape

Zimbabwe is entering a new phase of industrial development, with a strong pipeline of beneficiation and coal-to-energy projects aimed at unlocking more value from its mineral wealth. From lithium sulfate and caesium plants to new platinum group metals (PGM) smelting arrangements and large-scale coal-based energy projects, the country is laying the groundwork for local processing and energy security.



By Ryan Chigoche

In recent years Zimbabwe has been intensifying efforts to develop its lithium beneficiation industry, aiming to maximize economic returns from its substantial lithium reserves. As Africa's leading lithium producer, the country has attracted over \$1 billion in investments since 2021, primarily from Chinese firms such as Zhejiang Huayou Cobalt, Sinomine Resource Group, Chengxin Lithium Group, Yahua Group, and Canmax Technologies.

To promote local value addition, the government initially mandated that lithium miners submit plans for producing battery-grade lithium domestically by March 2024. However, due to a significant drop in global lithium prices of over 80% in the past year, this deadline was extended, and the government adopted a more flexible, case-by-case approach.

Several companies have responded with plans for local processing facilities.

Sinomine Resource Group, for instance, has invested approximately \$300 million in a spodumene concentrator at its Bikita mine and is conducting feasibility studies for a lithium sulphate plant. Similarly, Zhejiang Huayou Cobalt's Prospect Lithium Zimbabwe has inaugurated a plant capable of processing 4.5 million metric tons of hard rock lithium annually into concentrate for export.

In addition, the state-owned Kuvimba Mining House has entered into a \$310 million agreement with a consortium of British and Chinese investors to construct a lithium concentrator at the Sandawana mine. This facility is expected to process 3 million metric tons of ore annually,

producing 600,000 metric tons of lithium concentrate.

From lithium sulfate and caesium plants to new **Platinum Group Metals (PGM)** smelting arrangements and **large-scale coal-based energy projects**, the country is laying the groundwork for local processing and energy security.

Despite these advancements, challenges persist, including inadequate infrastructure, and power supply issues. As a result, this article will look at the various

Beneficiation & Value Addition ongoing and upcoming local processing

projects in lithium and PGM and also a look at key coal-to-energy projects which will most likely support these beneficiation projects.

**Sandawana Mine to invest US\$28 in lithium concentrate plant**

Sandawana Mine, located in Mberengwa and operated by state-owned Kuvimba

Mining House (KMH), is embarking on a major beneficiation drive through two significant upcoming projects. The first is a US\$28 million investment into a lithium concentrate processing plant, which is expected to be completed by March 2026. Once operational, the plant will double current production, enabling the mine to produce up to 500,000 tonnes of lithium concentrate annually.

Complementing this is a US/\$310 million Build-Operate-Transfer (BOT) agreement signed in July 2024 between KMH and a consortium of British and Chinese investors. Under this arrangement, a large-scale lithium concentrator will be constructed to process 3 million tonnes of ore per year, yielding approximately 600,000 tonnes of lithium concentrate. The facility is expected to become operational within 18 months of the agreement, and ownership will be transferred to the Zimbabwean government after six years.

These developments are taking place at a mine that has seen remarkable transformation. KMH acquired Sandawana Mine in 2019 for approximately US/\$5 million when it was a defunct emerald operation. Since then, the company has invested over US/\$56 million in exploration and development, with the mine's estimated value now rising to between US\$2.5 billion and US\$3 billion. This growth reflects Zimbabwe's broader push to add value to its mineral resources and secure a stronger position in the global lithium supply chain.

#### **Arcadia's Ongoing Feasibility Study Signals Battery-Grade Ambitions**

As Zimbabwe scales up efforts to move beyond raw lithium exports, the Arcadia

Lithium Project operated by Prospect Lithium Zimbabwe (PLZ) is actively conducting a feasibility study for a lithium sulfate plant. This strategic move is aimed at upgrading locally produced lithium concentrate into battery-grade material, a critical step in the country's beneficiation and value-addition agenda.

Located in Goromonzi, Mashonaland East, Arcadia has already emerged as a major asset in Zimbabwe's lithium portfolio. Since acquiring the project for US\$422 million in 2022, PLZ has invested a further US\$300 million to construct a cutting-edge processing plant. Commissioned in July 2023, the facility has an annual ore processing capacity of 4.5 million tonnes and produced around 280,000 tonnes of lithium concentrate in its first full year of operations.

The feasibility study represents a forward-looking investment in domestic processing capacity, positioning Arcadia—and Zimbabwe more broadly—to play a significant role in the global electric vehicle and energy storage supply chains. If realized, the lithium sulfate plant would mark a major breakthrough in Zimbabwe's drive toward high-value mineral beneficiation.

#### **Gwanda Lithium Plant to handle toll processing for Sandawana**

The Gwanda Lithium Mine, located in Mandihongola, Gwanda South, is operated by Dinson Mining Investments, a subsidiary of China's Tsingshan Holdings. Backed by a US\$54 million investment, the mine commissioned a state-of-the-art beneficiation plant in early 2025, capable of processing one million tonnes of ore annually to produce about 200,000 tonnes

of lithium concentrate. Since beginning operations in January 2024, the plant has been producing 1,500 tonnes of concentrate daily. The Zimbabwean government granted a six-month license for a trial shipment of 5,000 tonnes to China, marking progress in positioning Zimbabwe within the global lithium supply chain.

The Gwanda Lithium Plant, as part of its toll processing arrangement, is expected to play a significant role in the beneficiation of lithium ores from the Sandawana Mine.

The project currently employs around 300 people, 80% of whom are locals. It forms part of Tsingshan's broader plan to develop an integrated lithium value chain, which could include a local battery manufacturing plant in future.

#### **Zimplats and Mimosa Strike Toll Refining Deal to Strengthen PGM Beneficiation**

Zimplats and Mimosa Mining Company have signed a landmark toll refining agreement, allowing Mimosa to utilize Zimplats' upcoming Base Metal Refinery (BMR) for toll treatment of its platinum group metal (PGM) concentrates. This partnership aligns with Zimbabwe's push for increased mineral beneficiation and local processing capacity, which is central to national mining policy. Zimplats, a subsidiary of Impala Platinum, has significantly expanded its metallurgical capacity with the completion of a state-of-the-art smelter at the Selous Metallurgical Complex, which now boasts a 38 MW furnace capable of processing up to 380 kilotons per annum, tripling its previous capacity.

**Continued on page 20>>**



This expansion enables Zimplats to process PGM concentrates locally, reducing its reliance on offshore smelting.

The construction of the BMR, designed to extract nickel, copper, and cobalt from converter matte, is ongoing, with key infrastructure already in place, including leach tanks and solvent extraction units. Mimosa, jointly owned by Impala Platinum and Sibanye-Stillwater, will benefit from this shared beneficiation model, which is more cost-effective than setting up independent refining facilities. Zimplats' expansion also includes an acid plant to recover sulphur dioxide and produce sulphuric acid, reducing emissions and supporting Zimbabwe's fertilizer and chemical industries. Despite challenges, such as declining PGM prices leading to the deferral of some projects, the Zimplats-Mimosa partnership is expected to set a precedent for shared beneficiation models, furthering Zimbabwe's industrialization goals and potentially influencing future projects in minerals like lithium and chrome.

Zimbabwe's push for PGM beneficiation is central to its broader mining policy, which aims to increase value addition within the country and reduce dependence on raw mineral exports. As part of this strategy, major players in the platinum sector, including Zimplats and Mimosa Mining Company, are exploring ways to enhance local processing capabilities. The agreement between Zimplats and Mimosa marks a significant step forward in the country's beneficiation agenda, with the two companies working together to utilize shared infrastructure for refining platinum group metals.

beneficiation agenda, with the two companies working together to utilize shared infrastructure for refining platinum group metals.

#### **New Coal to Energy Projects in Zimbabwe: Key Developments and Timelines**

Despite global campaigns against fossil fuels, coal remains a cornerstone of Zimbabwe's energy strategy. The country continues to rely heavily on coal to meet its electricity demands, largely due to its abundant reserves and the urgent need to address chronic power shortages. With coal output projected to increase to 6.3 million metric tonnes in 2025, up from 5.7 million tonnes in 2024, key projects from producers like Zambezi Gas and Hwange Colliery are set to boost production.

#### **Titan New Energy Project – 720 MW**

The Titan New Energy Project, in partnership with the Chinese energy firm Titan New Energy, will be located near Hwange. The plant is expected to generate 720 MW, helping alleviate Zimbabwe's power shortages. The project is in the early construction stages with government and Chinese financial backing. Completion is expected between 2025 and 2026.

#### **Lusulu Power Project – 600 MW (Phase 1)**

The Lusulu Power Project, proposed by Pan African Energy, is located in Binga District. The initial phase will bring 600 MW online, with plans for significant future expansion, aiming for a total capacity of 2,000 MW. The first phase is expected to be completed by 2027.

#### **Zambezi Gas & Coal Mine Project – 750 MW (Phase 1)**

The Zambezi Gas project will use coal from its reserves in Hwange to generate 750 MW in the initial phase, with potential expansion to 2,000 MW. The project is in the planning and feasibility phase, with the first phase expected to begin by 2026. Zambezi Gas is also investing \$450,000 in a coke oven to increase production by 60%, with completion expected by October 2025.

#### **Hwange Colliery Projects**

Hwange Colliery is making significant investments to ramp up production. It plans to invest \$17 million in Unit 3 maintenance, expected to increase production by 13%. The maintenance is slated for completion in 2025. In addition, the mine is investing \$3.1 million in battery oven resuscitation, which will boost production by 100%.

Hwange Power Station, which supplies about 40% of Zimbabwe's electricity, is also undergoing major upgrades with the addition of Units 7 and 8, which are expected to add 600 MW to the national grid.

These new projects, along with increased coal production, are vital for diversifying Zimbabwe's energy mix, improving grid reliability, and reducing the country's dependence on hydropower. The push to increase coal production and expand thermal power capacity is crucial to meeting the growing demand for electricity in both residential and industrial sectors. ENDS//



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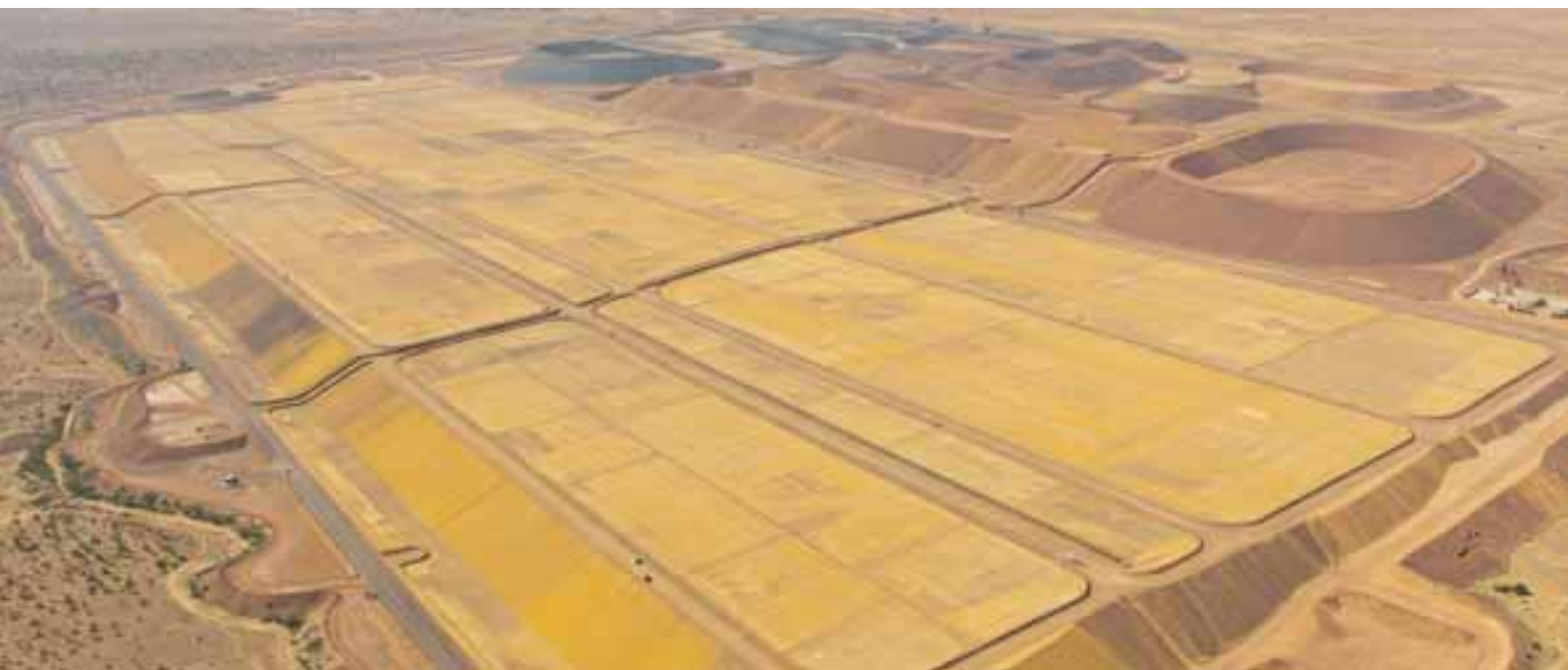


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# Eureka Strengthens Production with \$4 Million Tailings Storage Investment

Eureka Gold Mine, operated by Dallaglio Investments, the gold mining arm of VFEX-listed Padenga Holdings, has embarked on a critical infrastructure project to sustain its gold production, committing US\$4 million towards the expansion of its Tailings Storage Facility (TSF) in 2025.



This investment is part of a broader, ongoing TSF construction programme, with the mine having already spent over US\$12 million to date.

By Rudairo Mapuranga

In an exclusive interview, Eureka Gold Mine General Manager Nelson Banda highlighted the technical and environmental significance of the project, stating that the US\$4 million is part of an ongoing annual investment into the TSF construction programme.

"The capex is part of ongoing annual investment into the TSF construction programme. The facility is currently downstream and will transition into a modified upstream arrangement in 2026," Banda said.

Tailings Storage Facilities play a crucial role in managing the by-products of gold ore processing. Eureka's approach to TSF construction and management reflects a strong commitment to environmental stewardship and operational safety. The mine is ISO 14001 certified and is progressively adopting the Global Industry Standard on Tailings Management (GISTM), with full compliance on critical aspects already in place.

"Our facility uses technology based on flow and pressure sensors and interlocks on

delivery lines to detect and manage pipe bursts and blockages. Additionally, the facility is under 24/7 CCTV surveillance," Banda noted. "We also recycle water from the facility for use in the plant, ensuring resource efficiency and reducing environmental impact."

Eureka's TSF project includes a comprehensive rehabilitation plan with financial provisions aligned to legislative requirements. The mine also works closely with an independent Engineer of Record, who provides guidance on the facility's design, construction, and operation.

Beyond environmental considerations, the TSF expansion is strategically tied to Eureka's production ambitions. A well-constructed TSF ensures uninterrupted ore processing, stabilising throughput and supporting the mine's gold output targets. This was evident in 2024 when Eureka surpassed its annual gold production target of 1,697.37 kg by producing 1,811.03 kg—an impressive 6.69% increase. This performance reflects the mine's operational efficiency and strategic foresight.

Eureka's TSF investment also comes as parent company Dallaglio Investments pushes forward with a US\$15 million

expansion of its Pickstone and Peerless operations. While separate from the Eureka project, this broader investment strategy underscores Dallaglio's long-term commitment to scaling its gold production and consolidating its footprint in Zimbabwe's mining sector.

Banda emphasized that tailings management is more than a regulatory requirement—it is a critical pillar of sustainable mining.

**Eureka's TSF project includes a comprehensive rehabilitation plan with financial provisions aligned to legislative requirements.**

"We are not just building infrastructure; we are securing the future of our operations, protecting our environment, and ensuring the safety of our workers and surrounding communities," he said.

As Zimbabwe's mining sector continues to evolve, Eureka Gold Mine's proactive approach to tailings management sets a benchmark for responsible mining practices. The latest TSF investment ensures that the mine is not only safeguarding its operational capacity but also aligning with global environmental and safety standards.

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# Why Energy Reform Is Now Central to Mining Strategy

Zimbabwe's miners are rethinking how they power operations as energy insecurity mounts. New policies, private-sector lobbying, and IPP-driven investment may finally shift the dial. Zimbabwe's mining sector, a vital foreign currency earner, is increasingly constrained by chronic power shortages.



As Zimbabwe's mining sector advances its growth and value addition agenda, one critical enabler stands out: energy. The evolving power landscape is prompting mining companies to explore diversified energy solutions that ensure operational stability and sustainability. From solar and hybrid systems to private power arrangements and proactive engagement with policy frameworks, miners are adopting innovative approaches to remain productive and competitive.

While new generation capacity continues to come online, growing demand and existing structural challenges present opportunities for reform. Recent developments, such as the Energy Compact and broader government reforms, have the potential to unlock private sector investment and facilitate a shift toward a more stable and diversified energy future.

A Chamber of Mines Zimbabwe survey indicates that the power supply situation, while showing progress, still requires significant strengthening. The mining industry, a key pillar of the economy and source of foreign currency, is estimated to be losing up to US\$500 million annually in potential revenue due to power-related disruptions. About 76% of mining operations reported production losses of up to 10%, while 24% experienced losses above 10% in the past year.

The commissioning of Units 7 and 8 at the

Hwange Power Station has contributed substantial capacity to the national grid. However, with Finance Minister Mthuli Ncube projecting electricity generation to reach 10,000 GWh in 2025 against an anticipated demand of 19,000 GWh, a gap of approximately 9,000 GWh is expected. This presents a clear opportunity for enhanced collaboration with Independent Power Producers (IPPs).

More than US\$1 billion worth of IPP projects are currently in the pipeline, demonstrating strong investor interest. However, improvements to the operating environment and policy frameworks will be essential to move these projects forward. Key areas for enhancement include the alignment of Power Purchase Agreements (PPAs) to international financing norms. Indexing PPAs to a stable currency, such as the U.S. dollar, and ensuring bankability would significantly mitigate currency risks and boost investor confidence.

Zimbabwe possesses abundant solar and renewable energy resources. Realising this potential will require the establishment of a secure and transparent investment framework that supports long-term project development and sustainable returns.

Speaking to Mining Zimbabwe, Minister of Mines and Mining Development, Hon. Winston Chitando, noted that the government is currently facilitating several

solar and wind energy projects targeted at meeting the power requirements of the mining industry.

Minister of Energy and Power Development, Hon. July Moyo, has also encouraged the private sector to increase its participation in the energy space. He affirmed that many of the regulatory constraints that previously hindered investment have now been addressed.

Modernisation of infrastructure remains a key priority. Strengthening assets such as those at Hwange Power Station will further reinforce reliability across the grid.

What is required now is a coordinated and investor-aligned national energy strategy. This includes clear and enforceable contracts for IPPs, secure off-taker agreements, and access to a robust wheeling framework that allows power to be transmitted effectively across the national grid.

As the government continues to advance policies that promote increased capacity and grid stability, there is a growing call for enabling the full spectrum of electricity services—generation, transmission, distribution, and retail—through partnerships with Independent Power Producers. The alignment of policy and private sector readiness will be critical in securing Zimbabwe's energy future and supporting sustained mining sector growth.

"Zimbabwe's government has outlined several infrastructure initiatives to support mining operations, with a focus on energy, rail, and road upgrades. The government is prioritizing solar and wind projects, including a 250 MW floating solar plant on Lake Kariba (in partnership with Zambia), funded by a \$250 million Afreximbank facility, with completion targeted for mid-2026. Coal Power Stabilization: short-term reliance on coal-fired plants such as Hwange Unit 5 commissioning to address immediate power shortages," Chitando said.

Zimbabwe's newly approved Energy Compact aims to bridge the energy supply gap by boosting domestic electricity generation and improving regional power connectivity, especially benefiting energy-intensive sectors like mining.

The plan includes diverse energy sources—thermal, solar, wind, and hydro—along with strategic initiatives like Zambezi hydro projects, floating solar on Lake Kariba, and expanded interconnectors with South Africa, Mozambique, Zambia, and East Africa. By expanding generation and reinforcing infrastructure, the Energy Compact is designed to improve electricity availability.

A draft of the Energy Compact is set to be finalized, with the Energy Minister soon traveling to the UK in the coming weeks to sign related treaties. Under the new framework, IPPs will handle generation, transmission, and retailing, while the government focuses on regulation and benchmarking tariffs against SADC standards.

Industry expert and Power Giant CEO Dr. Edzai Kachirekwa told Mining Zimbabwe that there will be an influx of

investors once the Energy Compact policy is passed.

"Zimbabwe is a good investment breeding ground due to its geographical location, which has more than 8 hours of sunshine per day. As IPPs are at the forefront of adopting new technologies and pushing the boundaries of renewable energy innovation, we should also understand that the role of the government is to promote and create a conducive environment for IPPs to thrive, as they invest in research and development. The Government has been working extremely hard to remove bottlenecks that hinder investment in the renewable energy

industry by promoting new regulations that are investor-friendly. The Government of Zimbabwe has addressed these issues, and within the next few months, the country shall experience an influx of investors due to the friendly policies introduced by the Government. As IPPs

Zimbabwe's government has outlined several infrastructure initiatives to support mining operations, with a focus on energy, rail, and road upgrades.

are a pivotal pillar to the growth of the Zimbabwean economy, they also act as a solution to remove the monopoly of traditional utilities, thereby creating a competitive tariff system and customer democratic choice of supplier," Kachirekwa said.



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# ZCDC Surges Toward 10 Million Carats as Diamond Production Jumps 41%

Zimbabwe's state-owned diamond producer, the Zimbabwe Consolidated Diamond Company (ZCDC), is rapidly advancing toward an ambitious annual production target of 10 million carats, bolstered by a 41% increase in diamond ore mined and stripped—rising from 6.3 million tonnes in 2022 to 8.9 million tonnes in 2023, Mining Zimbabwe can report.



This growth is fueled by strategic investments in processing plants, exploration, and security infrastructure, positioning the company as a key driver of Zimbabwe's diamond sector expansion.

By Rudairo Mapuranga

The Mines and Mining Development Minister, Hon. Winston Chitando, confirmed ZCDC's aggressive expansion strategy, emphasizing that the company is on track to significantly increase output from its current 5 million carats per year.

"This year, ZCDC is targeting close to 6 million carats, a remarkable leap from just 1.8 million carats a few years ago," he said.

The push toward 10 million carats hinges on opening new mining areas and securing capital for advanced exploration and production technologies.

ZCDC's progress is underpinned by major operational milestones, including the commissioning of a Deep Boiling Facility

at Chiadzwa Mine, which enhances diamond quality and value addition before export. The company has also invested in critical infrastructure such as the Jaw Area 700 Phase 2 Plant and the Conglomerate Detachment Plant, which have been instrumental in boosting production despite global market challenges, including competition from synthetic diamonds and geopolitical pressures.

To safeguard its operations and ensure compliance with international standards, ZCDC has implemented automated security systems, reinforcing adherence to the Kimberley Process Certification Scheme and minimizing diamond theft. Beyond mining, the company remains committed to community development through its Corporate Social Investment programs, improving livelihoods in diamond-producing regions.

Zimbabwe's broader diamond industry is gaining momentum, with Murowa Diamonds contributing a steady 600,000 carats annually, while Anjin Zimbabwe is targeting to reach 1 million carats this year and is expected to ramp up production.

Additionally, Alrosa Zimbabwe, in partnership with the government, is conducting extensive exploration to uncover new diamond-rich deposits, further solidifying Zimbabwe's position in the global market.

Zimbabwe is poised to become a significant diamond producer, unlocking economic benefits through increased export revenues, job creation, and infrastructure development. The company's growth trajectory not only underscores its rising prominence in the sector but also aligns with the nation's vision of mineral-driven industrialization.

"This year, **ZCDC** is targeting close to 6 million carats, a remarkable leap from just 1.8 million carats a few years ago,"

# Betterbrands Collaborating with Gold Mining Company

Betterbrands Jewellery (Pvt) Ltd is the leading gold-buying company in Zimbabwe, mobilising no less than 70% of the artisanal and small-scale gold deliveries to Fidelity Gold Refinery (Pvt) Ltd in 2024



Gold has become a pivotal contributor to the gross domestic product (GDP) of Zimbabwe through the collaboration of major stakeholders in the industry.

Betterbrands Jewellery being one of the major players along the gold value chain with a main focus on gold trading found it pertinent to support downstream companies in ramping up gold production. Mining being a capital-intensive business meant a lot of players struggled and continue to struggle to raise capital to ramp up production despite the high demand for the commodity and rising international commodity prices.

Financial constraints emanating from the reluctance of investors to inject capital in gold mining continue to slow down the gold industry growth. Dearth in fresh capital injection into mining continues to result in the use of inappropriate and inefficient technologies.

The use of such technologies has resulted in the production of gold remaining stagnant in the range of 33 to 38 tonnes per year.

Betterbrands being a major player in the gold trading space realised that its survival hinged on providing support to downstream companies in the gold mining industry. Driven by a strong desire to support the country in foreign currency generation through increased gold production, Betterbrands entered into financing arrangements with Dallaglio Investments (Pvt) Ltd. The financial arrangements supported the company in its operations through shaft sinking at the

Pickstone/Peerless mine in Chegutu and enhanced cashflows which increased the availability of mining consumables at Eureka mine.

Driven by a strong desire to support the country in foreign currency generation through increased gold production, **Betterbrands entered into financing arrangements with Dallaglio Investments (Pvt) Ltd.** The financial arrangements supported the company in its operations **through shaft sinking at the Pickstone/Peerless mine in Chegutu** and enhanced cashflows which increased the availability of mining consumables at Eureka mine.

With improved financial capacity, the company witnessed growth in gold production such as 750 kilograms recorded in 2024. The results are a testament to the benefits of collaboration efforts of players along the gold value chain and as more players participate the industry will witness phenomenal growth in the next five years to 2030.



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# Zimplats and Mimosa Strike Toll Refining Deal to Strengthen PGM Beneficiation

In a bold step toward fulfilling Zimbabwe's mineral beneficiation agenda, two of the country's leading platinum group metal (PGM) producers, Zimplats and Mimosa Mining Company, have reached an agreement that will see Mimosa utilize Zimplats' upcoming Base Metal Refinery (BMR) for toll treatment of its concentrates.



The partnership marks a significant milestone in the country's beneficiation efforts, with local processing capacity becoming increasingly central to national mining policy.

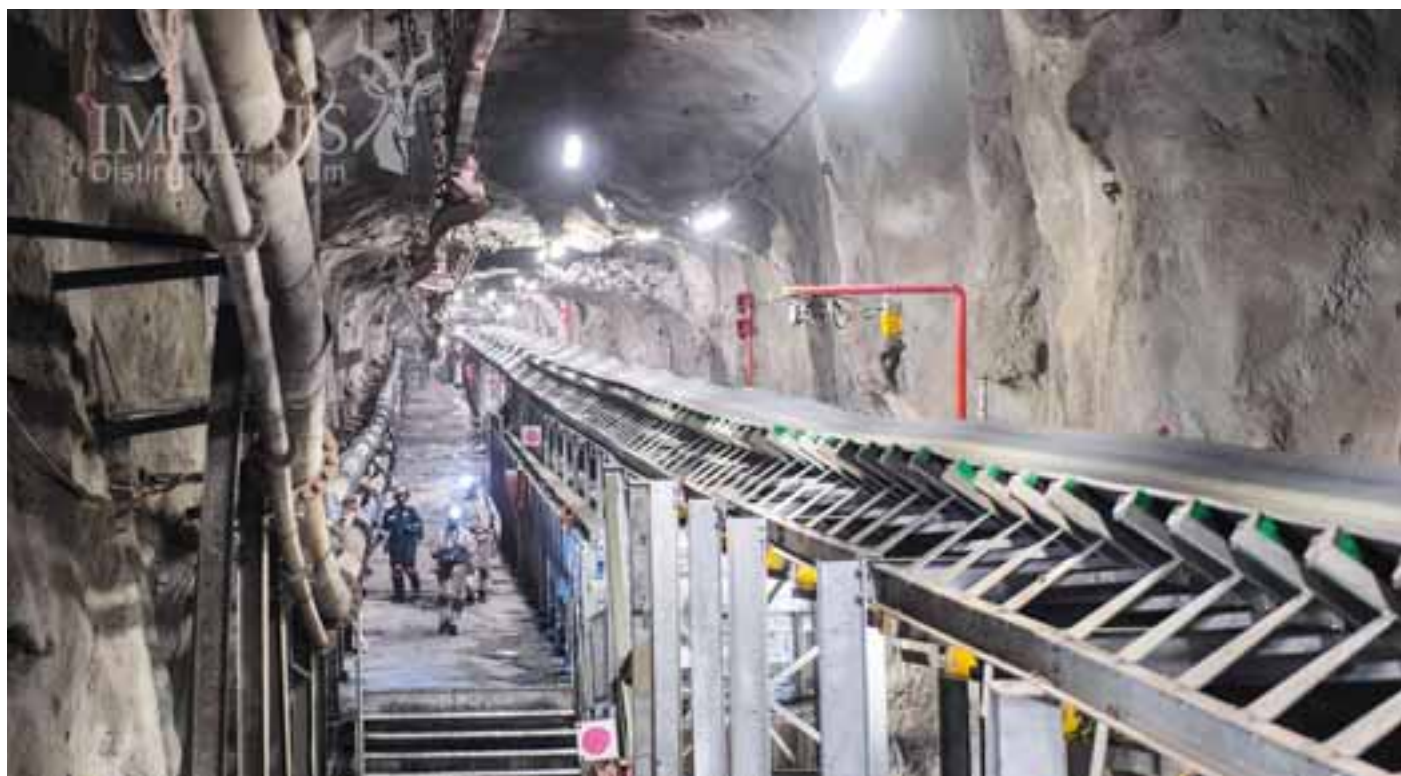
Zimplats, a subsidiary of Impala Platinum Holdings (Implats), has been making

significant strides in its beneficiation drive.

At the core of this initiative is the completion of its new state-of-the-art smelter at the Selous Metallurgical Complex. Designed with advanced pyrometallurgical technology, the facility includes a 38 MW furnace—among the

largest on the continent—and a high-efficiency flash dryer that prepares wet PGM concentrates for smelting.

The new installation has increased Zimplats' smelting capacity from around 120 kilotons to 380 kilotons per annum, effectively tripling throughput and



positioning the company as a regional leader in metallurgical processing.

With the commissioning of the new furnace, the company is now able to significantly reduce its reliance on offshore smelting services.

Once dried and fed into the furnace, the concentrates are transformed into furnace matte, which then undergoes further conversion to remove iron and sulphur.

These process streams are part of an integrated metallurgical circuit that is built to support both efficiency and scalability.

Construction of the accompanying Base Metal Refinery is currently underway, intended to complete the beneficiation chain by extracting nickel, copper, and cobalt from the converter matte.

Zimplats has already secured all major process circuits for the BMR, including leach tanks, solvent extraction units, and electrowinning infrastructure.

Assembly and commissioning are

ongoing, with the plant engineered to accommodate feed from other producers such as Mimosa through structured toll agreements.

Mimosa, jointly owned by Impala Platinum and Sibanye-Stillwater, has long acknowledged its limitations in setting up standalone refining facilities due to the size and grade of its ore body.

The agreement with Zimplats provides a cost-effective and policy-compliant solution, allowing the company to fulfil beneficiation obligations without duplicating infrastructure.

At the core of this initiative is the completion of its new state-of-the-art smelter at the **Selous Metallurgical Complex**. Designed with advanced pyrometallurgical technology, the facility includes a **38 MW furnace** among the largest on the continent and a high-efficiency flash dryer that prepares wet PGM concentrates for smelting.

Zimplats' metallurgical expansion strategy also includes an acid plant that will recover sulphur dioxide from the furnace off-gas stream to manufacture sulphuric acid.

This will not only reduce environmental emissions but also produce a valuable input for Zimbabwe's fertilizer and chemical industries. The plant is aligned with broader industrial synergies, linking mining to agriculture and domestic manufacturing.

Despite the momentum, Zimplats' parent company, Implats, has announced a deferral of some Zimbabwean projects, including the full-scale rollout of the BMR and the planned 185 MW solar plant.

The decision is linked to declining global PGM prices, which have prompted reassessments of capital allocation across the group. Nevertheless, the core infrastructure for beneficiation continues to advance, with phased implementation focusing on strategic deliverables.

The Zimplats-Mimosa partnership signals a shift toward shared beneficiation infrastructure as a solution to the high capital requirements of mineral processing.

It demonstrates how the sector can respond to regulatory frameworks by adopting collaborative models that preserve economic viability while promoting in-country value addition.

As construction progresses and commissioning timelines approach, the integrated facilities at the Selous Metallurgical Complex are poised to become central to Zimbabwe's PGM value chain.



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# Meet Tendai Madondo

## The Branding Architect Shaping Kuvimba Mining House's Corporate Identity and Social Impact



Tendai Madondo

In a male-dominated mining industry where narratives are often written by engineers and financiers, Tendai Madondo stands out—not only as the Head of Corporate Affairs at Kuvimba Mining House (KMH) but as a seasoned strategist whose career traverses media, international development, and infrastructure. Speaking to Mining Zimbabwe, Madondo shared her journey, challenges, and vision for the mining giant's role in Zimbabwe's socio-economic transformation.

By Rudairo Mapuranga

**You've worked across continents in very diverse industries. How has that shaped your role at Kuvimba?**

My journey has been about finding meaning in every role I've taken. From my early days in community mobilisation in Ireland to governance advisory for Christian Aid across 49 countries, I've always sought to create impact that resonates with people's lived experiences. Now, at Kuvimba, that translates into driving brand visibility while ensuring our Corporate Social Responsibility (CSR) genuinely serves the hardest-to-reach communities.

**Kuvimba is relatively new but already influential. How are you positioning the company for long-term impact?**

Kuvimba is not just a mining house; it's a

strategic economic player. Our CEO is an Anglo-trained engineer with global experience, bringing a clear vision anchored in sustainability. My role is to amplify the work we are doing—not for vanity metrics, but to showcase how local communities are genuinely benefiting from our operations. It's about building a legacy of responsible mining.

**As a woman in leadership within the mining and energy sectors, what are the unique challenges you've faced?**

Infrastructure and mining aren't organically designed for female leadership. The systems, cultures, and even operational priorities are historically male-dominated. That means women have to work twice as hard to be heard, to prove their relevance. But things are changing. There's growing recognition that diverse perspectives—particularly from women—enrich decision-making and drive better outcomes.

**What are the key steps needed to create equal opportunities for women in mining?**

It's a two-way street. Women need to actively break down glass ceilings through networking, visibility, and continuous self-education. But institutions also need to be intentional. Policies that support gender inclusion, from attachment programmes to executive leadership pipelines, are crucial. We have to stop

waiting for organic change—it has to be engineered.

**Kuvimba has several high-impact community projects. How are you ensuring these initiatives go beyond box-ticking exercises?**

Our CSR is people-driven, not just policy-driven. For instance, when communities say they need a deep tank and not a preschool, we listen. It's about cultural intelligence—understanding the nuances of each community and crafting interventions that are meaningful to them. This year, we launched an environmental stewardship campaign focused on Indigenous tree planting—not for PR, but for genuine ecological and socio-economic impact.

**Given your extensive background, what personal achievements are you most proud of?**

I'm proud of having worked in fragile, post-conflict countries like Afghanistan and DRC, where I saw firsthand how development must be community-defined. Those experiences are transferable. At Kuvimba, they guide how I approach stakeholder engagement—ensuring our mining operations empower rather than displace local livelihoods.

**What should be the foundation of ESG policies in Zimbabwe's mining industry?**

ESG cannot be a copy-paste from global templates. It must be contextualised to Zimbabwean realities—respecting traditions, understanding community dynamics, and ensuring development is sustainable and locally owned. That's the only way ESG will be meaningful.

**With such a demanding role, how do you stay motivated?**

I am unapologetically optimistic. Every challenge is an opportunity to build something better. Seeing tangible impact in communities we work with—that's what keeps me going.



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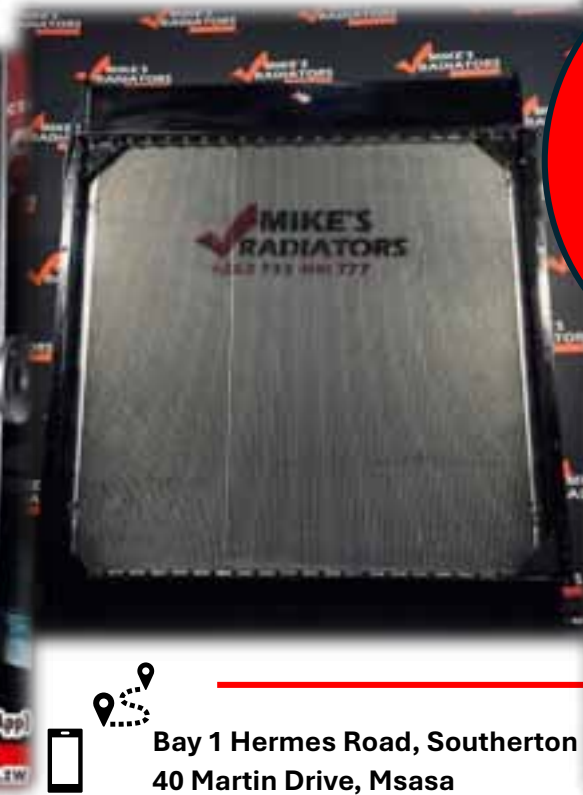
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# Mine Planning with Engineer Nigel Mukonoweshuro

Underground mine planning and design in complex orebodies is a multifaceted process that requires an intricate balance between maximizing economic value, ensuring geotechnical stability, and maintaining operational continuity. As orebodies become deeper, more structurally complex, and economically marginal, mining engineers must employ advanced tools, data integration, and cross-disciplinary collaboration to optimise designs. In this insightful interview, Engineer Nigel Mukonoweshuro shares his expert perspective on the challenges and innovations in underground mine design and planning.



Eng Nigel Mukonoweshuro

## How do you determine optimal stope dimensions and orientation for maximum ore recovery and geotechnical stability in a complex orebody?

Determining the optimal stope dimensions and orientation requires a balance between maximising ore recovery and geotechnical stability. 3D geological modelling helps to understand the orebody's geometry and structure, and these are followed up by geotechnical investigations to determine key matrix like your Rock Mass Rating (RMR) from Uniaxial Compressive Strength (UCS) and triaxial strength of the host rock. Stope orientation is usually parallel to the dip of the orebody to minimise dilution, and this should be favourable to reduce stress concentrations. Preliminary stope designs are based on stability checks, and historical data based on similar ground conditions. Numerical modelling and stability analysis then help to simulate extraction and refine the preliminary designs. Dilution and ore recovery factors are also analysed. Economic and scheduling constraints also come into play evaluated by cut-off grades, type of equipment (their access and productivity), and sequencing of blocks to minimise stress build-up. Other key considerations include hydrogeological (water inflow) and ventilation factors.

## How do you incorporate evolving resource models and grade control data into long-term mine plans without disrupting production continuity?

Immediately three key terms should come to mind, mine planning stages (strategic (long term), tactical (medium term) and operational (short term)), data reconciliation and risk management. The first step is to establish rolling strategic (long-term) and tactical (medium) term plans. These plans should be flexible and subject to periodic review. Resource model updates should be done regularly and integrated into the existing plans. Reconciliations and variance analysis will be used to refine the estimation parameters and planning assumptions applied through the determination of your F-factors. Reconciliation should be an implicit part of the mining process, and reconciliation targets should be a key performance indicator for well-run mines.

Scenario planning and sensitivity analysis are then utilised to assess the stability of the strategic (long-term) and tactical (medium-term) plans. Your grade control data should feed into your operational (short-term) plans on a weekly and monthly basis and then progressively into the tactical and strategic plans in that order. What is also key is to have your mine models designed in modular blocks or phases to allow updates to only affected areas/zones thus making the process manageable. A cross-functional review process should also be established to allow for the integration of different functions (geology, mine planning, operations and finance) and trigger action planning when major shifts and alignment to production

priorities. Your model updates should align with the operation's budget cycles or annual planning and production reforecasts. A good record of the updates and changes also supports accountability and future planning audits.

## With increasing pressure on cost efficiency, what innovations in underground design or scheduling have yielded the most value in your operation?

Some of the most valuable innovations in our underground mine design came with digital integration and strategic design choices. Development design optimisation software helps us to reduce development costs. Stope optimisation software allows us to rapidly reforecast and auto-schedule production utilising real-world operational rules. Drill and blast optimisation software has allowed for less overbreak and optimised fragmentation which reduces secondary blasting. The use of digital tools and technology incorporating LiDAR scanning allowed for seamless development and stope excavation measurement for reconciliation processes. The use of semi-autonomous equipment has also reduced our labour costs, improved productivity and allowed for the removal of man from high-risk tasks/zones.

## How do you manage trade-offs between ore recovery, dilution, and safety when designing stopes and production sequences?

Firstly, a multi-criteria approach is key to an advanced mine planning approach. An integrated value-based design framework is utilised, measured by the Net Smelter Return (NSR) or value per tonne of ore mines. Modelling and analysis of trade-offs for:

**Stope shape optimisation is done using modelling software and economic outcomes are compared for different designs,**

**Dilution vs Safety where wider stopes increase recovery but lead to unstable spans and hence wall failure so safe stope spans should be employed, and**

**Ore recovery vs safety where maximum recovery will require tighter stope**



**boundaries near wall contacts and increase risks of overbreak and unsupported voids. This is regulated by enhancement of ground support design and sequencing adjustment to control exposure of man (lead and lag of stopes).**

Overall, the mine design should be practical and flexible. Production sequencing will require a balance of ground conditions and value attained from extracting the stopes (block evaluation). The trade-offs highlighted above should be quantified and compared to evaluate stope designs. Monitoring of the actual recoveries and dilution provides a feedback loop that allows for design improvement in future mining.

#### **Given Zimbabwe's energy supply challenges, how do mine plans incorporate power reliability, ventilation demand, and backup systems?**

Mine plans now incorporate energy availability into both the design and operational strategies. Shift scheduling should be based on power availability to allow for high-energy activities to utilise off-peak periods. Equipment deployment should also be staggered to avoid simultaneous startups at once. Development scheduling should also allow for ventilation as it goes especially in shaft sinking or decline systems.

Ventilation management can integrate the use of Ventilation on Demand (VoD) i.e., use of sensors and schedules to control underground airflow. Fan selection should include the use of high-efficiency axial fans or the use of variable speed drives (VSDs)

on main or booster fan installations.

Use of backup and hybrid energy systems such as diesel generators and/or solar systems which lower base demand and stabilise power during peak outages.

Plans should allow for buffering of headings and the creation of stope inventories for flexibility and maintenance of the production schedules.

#### **What role do software and digital mine planning play in your daily work, and which tools have proven most reliable under local conditions?**

The core roles of digital mine planning tools are for 3D geological and resource modelling, stope and development design, scheduling and production planning, and reporting and communication. Various tools are utilised in different mining operations in Zimbabwe but the Deswik Suite comes highly recommended under local conditions. Other software packages include Datamine Studio UG/Studio RM, Leapfrog Geo (for geological modelling), Maptek (Vulcan and Evolution), and AutoCAD/MineSight although less flexible but is useful for most legacy systems.

#### **How are sustainability and ESG considerations shaping the future of underground mine planning in Zimbabwe?**

Sustainability and Environmental, Social and Governance (ESG) are increasingly redefining the future of mining in Zimbabwe driven by both regulatory and economic necessity. Companies are now

under scrutiny from investors, the community, and the government to align with sustainable development goals. Environmental considerations are being made on mind design to cater for water management, energy efficiency, carbon reduction and environmental rehabilitation at the closure of operations. Social impacts and community expectations are being met with access designs being planned away from community zones, employment of locals and progressive rehabilitation for future land use. Planning Teams are increasingly required to document ESG risks with technical studies and mine design documentation in alignment with the Environmental Management Act, and other guiding principles such as the Global Reporting Initiative (GRI). Technology also now plays a part in monitoring of key elements such as water quality, emissions and noise utilising the Internet of Things (IoT). In future, ESG compliance will become central to financing as investors and Banks will increasingly demand transparency in ESG-integrated feasibility studies.

#### **How do you calculate the economic cut-off grade for an underground operation, considering factors like mining cost, recovery, and metal price?**

This calculation integrates several key variables i.e., mining cost, processing, and General and Administration (G&A) costs, metal prices, recoveries, and payability. Your economic cut-off grade in an underground mine distinguished between ore and waste.

A simple equation for economic cut-off grade for a single metal mining operation is given as:

$$COG = C / (R * P * F)$$

**Where:**

**C = Total cost per tonne (Mining + Processing – G&A) in \$/t**

**R = Recovery rate (given as a decimal e.g. 0.85 to 0.95 this is based on lab test and plant performance)**

**P = Metal price in \$/oz or (\$/g or \$/t)**

**F = Payability factor (if selling concentrates) (if selling to a smelter or refinery you apply deduction factors e.g. 98%).**

Continued on page 38>>

For multi-metal (polymetallic) deposits, the Net Smelter Return (NSR) approach is used and the NSR/t is compared to the cost per tonne. COG is applied to mine planning for block modelling and generation of ore/waste classifications.

## Can you share insights into how mine planning aligns with compliance, such as Mine Survey regulations, Safety Standards, or Environmental Management Plans?

Cross-functional planning teams involve Mine Planners, Geologists, Geotechnical Engineers, Surveyors, Environmental Officers and SHEQ Personnel which ensures legal obligations, risk management and stakeholder expectations are built into the mine plan from the onset. Misalignment risks legal penalties, operational delays and the loss of social license to operate.

Mine Survey Regulations stipulate how mine plans should comply with the Mining (Management and Safety) Regulations SI109 of 1990 and subsequent updates

giving accurate spatial data for legal boundaries, certified survey outputs and stope tonnage reconciliation and void tracking.

Safety and Occupational Health Standards guide how mine designs comply with ground support requirements, establishment of escape routes and refuge bays, ventilation planning, blasting and explosives regulations.

Environmental Management Plan (EMP) integration stipulates for designs that minimise surface disturbance, meet progressive rehabilitation/reclamation goals and plans for water management.

Regulatory submissions and reviews require quarterly production reports where the mine plan provides the stope tonnage estimates, survey submissions reflecting actual developments, environmental audits require plans showing the disturbed areas, water use and backfilling (if any) and safety files showing drawings of escape routes, support designs and ventilation plans.

**"The future of Zimbabwe's mining landscape requires Mine Planners who can think like Engineers, act like Economists and speak like Strategists."**

## Lastly, what advice would you give to young Zimbabwean professionals aspiring to become mine planners in a rapidly evolving mining sector?

I will close off this interview with a quote by an Abstract African which says, "The future belongs to those who believe in the beauty of their dreams."

Success in the Mine Planning field does not depend only on technical competence but the ability to adapt, lead and think systematically in an evolving and sometimes resource-constrained environment. Proficiency in software is a non-negotiable advantage in modern planning. Pursue certifications and continuous improvement through learning new skills. Get mentorship and field exposure and be bold to explore new approaches.

"The future of Zimbabwe's mining landscape requires Mine Planners who can think like Engineers, act like Economists and speak like Strategists." ENDS//



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# One-on-One with Caledonia Mining Chief Executive Officer (CEO) Mark Learmonth

As Zimbabwe's mining sector continues to attract global attention, companies like Caledonia Mining stand out for their long-term commitment, operational excellence, and strategic investment in the country. At the helm of Caledonia is a seasoned professional whose journey from chartered accountancy in London to leading one of Zimbabwe's top gold producers reflects a deep understanding of both finance and African mining dynamics.



Caledonia Mining CEO Mark Learmonth

In this exclusive interview, Mining Zimbabwe speaks with the Chief Executive Officer of Caledonia Mining Corporation Plc to explore his professional background, the company's success at Blanket Mine, and its ambitious plans for the Bilboes project—poised to become Zimbabwe's largest gold asset.

He also shares his insights on the evolving mining landscape, Caledonia's ESG priorities, and the role the company hopes to play in shaping the future of Zimbabwe's gold sector.

**Could you briefly share with us your professional background and journey in the mining sector leading up to your appointment as CEO of Caledonia Mining?**

**ML** I qualified as a chartered accountant in London in 1991, before moving into merchant/investment banking – initially in London and then in Johannesburg, mainly doing transactions in the mining sector in Africa. I joined Caledonia in June 2008, at which time Caledonia was focused on exploration for copper and cobalt in Zambia.

Over the following years, we decided to divest non-core assets and focus our efforts

on gold production in Zimbabwe. I became CFO in 2014 and was appointed CEO in 2023.

**Caledonia has been a consistent performer in Zimbabwe's gold sector, particularly through Blanket Mine. What have been the key drivers of this sustained performance despite a "challenging operating environment"?**

**ML:** Our success is based on tight operating and financial controls and disciplined capital allocation. It helps that we have a cash-generating asset in Blanket Mine, which has allowed us to fund growth using internally generated funds. However, this did require very close attention to forecasting and spending to ensure that we never ran out of money. It is only relatively recently that we have had access to external funds such as debt or the ability to raise equity.

Regarding Zimbabwe, I would challenge the common perception that it is a difficult jurisdiction. Yes, there are difficulties such as the frequent and rapid changes in policy; the heavy administrative and bureaucratic burden, the risk of repeated foreign exchange losses and inadequate access to dollars. Electricity is a problem, but electricity is also a significant problem

in other jurisdictions, and the Zimbabwe government has been more flexible than most in facilitating private-sector solutions. In other respects, Zimbabwe is markedly less difficult than other jurisdictions: there is a plentiful supply of well-educated, highly-experienced, hard-working labour; the country is stable from a security perspective; consumables can be procured either locally, or relatively easily in South Africa; there is no low-level corruption and, notwithstanding the frequent policy changes, government is not doctrinally opposed to commercial mining operations.

**The Bilboes project has been described as potentially Zimbabwe's biggest gold asset. Could you provide an update on its progress and its strategic importance to Caledonia's growth plans?**

**ML:** Bilboes will be Zimbabwe's largest gold project and represents a major opportunity for Caledonia. Based on the Preliminary Economic Assessment published last year, Bilboes will produce approximately 1.5 million ounces of gold over an initial 10-year life of mine. The inclusion of the neighbouring Motapa property, where we have just started exploring, could make the Bilboes project even bigger. Bilboes is a big capital project: total capital expenditure, based on the PEA is over \$400m.

To fund this project will require us to maximise our internal cash flows and to raise external debt finance so that we can minimise the amount of new equity that we need to raise. New equity funding is expensive because our share price does not fully reflect the underlying value of the business. The reasons for this disconnect reflect these broader misconceptions about Zimbabwe. It is beholden on all participants in the Zimbabwe mining sector to be more positive. To minimise the dilution of our existing shareholders, our approach is to build value through disciplined growth. We are working hard to optimise the economics of the project and to reduce the up-front funding requirement.

Continued on page 41>>

We are also considering some near-term revenue opportunities elsewhere in our portfolio which may increase our own internally generated equity contribution to the project. A project as big as Bilboes, if successful, would be transformational for Caledonia. It would also be transformational for Zimbabwe – not just in terms of contribution to the economy and broader stakeholders etc, but also by forcing international investors to revisit and reconsider their misperceptions about Zimbabwe. This could result in more capital being available at a lower price to advance other projects in Zimbabwe.

**ESG (Environmental, Social, and Governance) has become a central focus in global mining. How is Caledonia integrating ESG principles into its operations in Zimbabwe?**

**ML:** ESG is fully integrated into our operating model – we will shortly publish our 2024 ESG report which provides ample information on this where you see we do an enormous amount. Whether it's a computer lab at Sitezi Secondary School, our support for local health clinics, or our investments in renewable energy, we are committed to making a tangible and positive impact. ESG is very much part of our core principles and something we take very seriously. In Zimbabwe, social impact can be profound, and our ESG commitments are not only a reflection of our values but also a business imperative for long-term sustainability.

**With the recent appointment of Mr. Ross Jerrard as CFO, what strategic focus or operational improvements should stakeholders expect as Caledonia enters its next growth phase?**

**ML:** We are delighted that Ross has joined us. He was previously the CFO at Centamin, which accomplished in Egypt what we hope to achieve in Zimbabwe i.e. build and operate a world-class gold mine in a previously unfashionable, overlooked jurisdiction. However, Ross is just the latest addition to an excellent management team at Caledonia and at Blanket, which includes Mr James Mufara who joined us as COO in May last year. They are great recent additions to the team, but I would highlight that we already had very good-calibre individuals across many of our functions. Caledonia's senior management is focused on improving operating efficiencies across the entire business as well as implementing our growth strategy.

**The commissioning of the Central Shaft at Blanket Mine was a significant milestone. How has this impacted production capacity, operational efficiencies, and the overall outlook for Blanket Mine?**

**ML:** The commissioning of the Central Shaft has been transformative for Blanket Mine and allowed us to increase production from approximately 40,000 ounces to about 75- 80,000 ounces per annum. More importantly, Central Shaft has also given us the operational flexibility to restart deep-level exploration at Blanket. Last year we doubled Blanket's reserves, after which Blanket's mine life was extended out to 2041. Exploration continues at Blanket - at depth, in the shallower areas of the existing mine footprint and on other areas within Blanket's lease area that are not currently being mined. I am confident that Blanket can maintain production at the current level for many decades to come. Depending on exploration success, it may be possible to increase Blanket's production above 80,000 ounces per annum.

**How do you view Zimbabwe's gold mining sector evolving over the next 3 to 5 years, and what role do you envision Caledonia playing in this transformation?**

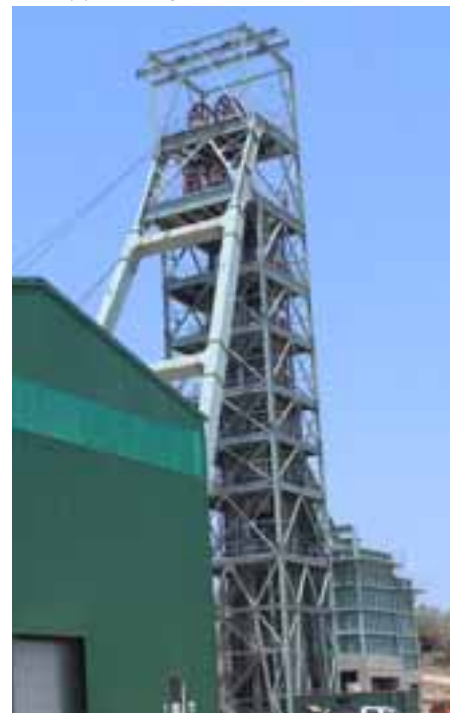
**ML:** Zimbabwe's gold industry has been starved of capital for many decades: notwithstanding the current high gold price, many of Zimbabwe's gold mines are struggling to survive due to a lack of historic investment. Large amounts of capital – hundreds of millions of dollars – are needed to recapitalise the industry and to fund new projects. Caledonia has already demonstrated that Zimbabwe can attract meaningful investment. In fact, we've raised more equity on the VFEX than on the NYSE. But this is not enough. International gold investors recognise that Zimbabwe has massive potential for world-class gold projects; it is also helpful that many other African Jurisdictions that were previously favoured by investors are now regarded as being unattractive. Zimbabwe could turn this situation to its advantage with a few policy initiatives – the most important of which is the liberalisation of the foreign exchange market. Investors will continue to be cautious about investing dollars into Zimbabwean projects if they are not confident they will get a dollar-denominated return. It's basically a global competition. Mining companies have choices, and Zimbabwe must compete globally for discretionary investment. With the right reforms, Zimbabwe has every opportunity to emerge as a preferred

mining jurisdiction—particularly as investors grow wary of instability elsewhere on the continent.

**Finally, what message would you like to share with stakeholders and delegates attending the Chamber of Mines Annual Mining Conference and Exhibition regarding Caledonia's commitment to Zimbabwe and the mining industry at large?**

**ML:** Caledonia is fully committed to Zimbabwe. All our projects are in Zimbabwe, 100% of our employees at Blanket Mine are Zimbabweans, we have increased the representation of Zimbabweans in the senior management team and on our Board and an increasing proportion of Caledonia's shares are owned by Zimbabweans. Over the last 10-12 years we have demonstrated a commitment to share the benefits of our success with all stakeholders: 34% of Blanket mine is owned by Zimbabweans, including the government, the Gwanda community and Blanket's employees. We are excited at the prospects to grow Caledonia's business in Zimbabwe – for the benefit of all stakeholders.

Since we acquired Blanket in 2006, we have proven that responsible, long-term investment in Zimbabwe is possible. We now want to build on that foundation. I see strong growth for Caledonia and the wider industry. I believe that Zimbabwe and the Zimbabwe gold industry in particular, has a unique opportunity to take advantage of current conditions – it requires a constructive and co-ordinated approach by the industry and government to unlock this opportunity.



# Policy and Local Readiness for Critical Minerals Beneficiation

We are living through a green revolution, an era that is redefining the value and relevance of mineral resources. The global push to reduce carbon emissions and meet net-zero targets by 2050 has fuelled demand for CRMs, also known as transition minerals, which are essential for the shift to cleaner energy.



By Ryan Chigoche

All of a sudden, metals such as lithium and other components essential to lithium-ion batteries have surged in importance, driven by the rise of electric vehicles (EVs), renewable energy technologies, and high-tech devices like smartphones and computers.

Given this demand, developing countries such as Zimbabwe, which are rich in lithium deposits, stand to benefit from the rising demand for CRMs.

According to the IEA's Global Critical Minerals Outlook 2024, lithium demand surged by 30% in 2023, while nickel, cobalt, and graphite experienced growth rates between 8% and 10%.

Looking ahead, the IEA projects that under its Net Zero Emissions (NZE) scenario, demand for critical minerals could nearly triple by 2030 and increase more than 3.5 times by 2050, reaching approximately 40 million tonnes annually.

However, questions have been asked about the readiness of Zimbabwe to take advantage of the rising demand.

These vast lithium deposits, if properly mined, beneficiated, and exported, could earn the country the much-needed foreign currency to meet its developmental objectives.

Furthermore, the lithium deposits could be a basis for a green economy, potentially

making Zimbabwe a key player in the region for the production of lithium batteries and other green products critical for a transition to cleaner energy.

Current Capacity for Processing Lithium and Rare Earth Elements in Zimbabwe and Key Investment Needs

In an interview with Mining Zimbabwe Mineral Economics Expert, Lyman Mlambo, said Zimbabwe's current activity in the lithium and cobalt sectors is concentrated in the upstream value chain: exploration, mining, and the production of concentrates such as spodumene, petalite, and cobalt.

A significant portion of these lithium-bearing ores is exported in raw or unconcentrated form.

Producing concentrates is the initial stage in the lithium-ion battery (LIB) value chain. Though technically simpler than later stages, it is still crucial and involves integrated mining and processing operations.

Zimbabwe is making progress in this area, driven largely by Chinese investment, similar to upstream leaders like Australia, Argentina, Chile, and China.

The midstream stage, however, is more complex and involves hydrometallurgical and pyrometallurgical processes to produce battery-grade materials like lithium hydroxide, lithium carbonate, and cobalt hydroxide.

This stage delivers significant value addition but demands major investment. While some Zimbabwean companies have announced intentions to move into this phase, progress has been limited.

To enable midstream beneficiation in Zimbabwe, several critical factors must be addressed:

**Transport Infrastructure:** *Efficient logistics are needed to move concentrates to processing sites, especially when mines are distant.*

**Energy Supply:** *Consistent, high-capacity energy is essential for energy-intensive metallurgical processes.*

**Capital Investment:** *Beneficiation plants require significant financial outlay due to their scale and complexity.*

**Water Access:** *Both hydrometallurgical and thermal processes depend on abundant, affordable water supplies.*

**Skilled Labor:** *A technically competent workforce is vital to operate advanced beneficiation facilities.*


**Chemical Supply Chains:** *Access to imported processing chemicals must be secure and reliable.*

Addressing these needs would make local lithium and cobalt beneficiation viable, positioning Zimbabwe to capture greater value from its resources.

An aerial photograph of the Victoria Falls Oasis resort. The image shows a large, multi-story building with a blue corrugated metal roof and several solar water heaters. The building is surrounded by lush green gardens, a swimming pool, and a paved walkway. A large tree is visible on the right side of the image.

# VICTORIA FALLS OASIS

## *Escape to Luxury at Victoria Falls Oasis!*

A photograph of a modern, well-lit interior room. The room features a large window with a view of the outdoors, a sofa, and a dining area. The room is furnished with contemporary decor, including a large bed with orange and white bedding in the foreground.

Relax in a serene 24-room retreat with modern amenities, vibrant gardens, and easy access to local hotspots.



Downstream stages of the LIB chain—manufacturing battery components (electrodes, electrolytes, cells) and assembling battery packs—are highly industrialized, requiring advanced infrastructure, skilled labor, and strong supply networks. China dominates these stages, followed by Japan and South Korea. Australia and Chile are prominent in midstream refining.

The rare earth elements (REE) value chain mirrors that of lithium, though with specific differences. Producing REE concentrates (around 80% purity) is commercially viable for Zimbabwe.

While exploration and mining are more complex due to REEs' scarcity, establishing a unit focused on exploration, mining, and concentrate production requires less capital than developing fully integrated refining and manufacturing facilities.

### Policy Gaps in Zimbabwe's Critical Minerals Strategy

According to Southern Africa Resource Watch, Zimbabwe's critical minerals sector is hampered by major policy gaps and the lack of a comprehensive strategy. Despite its rich deposits of lithium, cobalt, and platinum group metals, the absence of a coordinated approach leaves the country ill-equipped to capitalize on soaring global demand. This results in fragmented policies and weak coordination, curtailing the full potential of Zimbabwe's mineral wealth.

Commenting on the issue, Mineral Research Expert Lyman Mlambo told Mining Zimbabwe that a clear beneficiation strategy is essential as a foundation for a critical minerals strategy.

"The Government banned the exportation

of raw lithium through Statutory Instrument 213 of 2022, in an effort to incentivise the local beneficiation of lithium. Without a beneficiation policy and critical-minerals-specific policy, these regulatory measures amount to putting the cart before the horse.



Lyman Mlambo

Policy guides the development of proper laws and regulations, and not the other way. Zimbabwe needs a beneficiation policy to guide the development of local value chains for critical minerals as well as other minerals. An effective beneficiation strategy would balance between the need to localize higher value chains while maintaining a good supply of primary feed into the beneficiation facilities (that is, without suffocating the actual mining of the critical minerals). This is because higher value chain stages are more capital- and skill-intensive," Mlambo said.

To promote responsible mining and sustainable economic growth, Mlambo urged the government to adopt evidence-based policymaking.

Zimbabwe has often failed to utilize research produced by both local and international experts. More investment is needed in research and skills development in mining and mineral beneficiation. Countries that sustain long-term development rely on evidence to guide

policy and decision-making. The obvious question is: if decisions aren't based on knowledge and research, then what are they based on?

Mlambo also stressed the importance of grassroots involvement in shaping mineral policies, noting that mineral resources belong to all citizens.

He said a bottom-up approach is vital, aligning with constitutional devolution that empowers local communities to influence decisions and benefit from nearby mineral activities.

Community-based organizations (CBOs), civil society groups (CSOs), traditional leaders, local authorities, and marginalized groups—such as women, youth, people with disabilities, and historically disadvantaged communities—should be prioritized in consultations, as they are the most affected when constitutional rights are violated by mining operations.

Further complicating policy reform is a weak governance framework in the critical minerals sector.

According to the Zimbabwe Environmental Law Association (ZELA), the current legal and policy environment does not sufficiently support responsible mining, transparency, or community participation.

In conclusion, Zimbabwe stands on the brink of transformative economic growth, driven by its vast reserves of critical minerals. But to harness this potential, the country must urgently craft a clear and forward-looking Critical Minerals Strategy, anchored first by a robust beneficiation policy. The goal must go beyond extraction to ensure that these resources power inclusive development, industrialization, and long-term national prosperity.

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# Sustainability & ESG Leadership: Mines Driving Responsible Growth in Zimbabwe

Zimbabwe's mining sector is entering a new era where environmental, social, and governance (ESG) practices are no longer optional but essential for business survival and growth.



As global markets demand transparency and responsible sourcing, mining companies operating in Zimbabwe are stepping up efforts to integrate sustainability into their operations, with a clear focus on carbon reduction, renewable energy, water recycling, and genuine community engagement.

By Rudairo Mapuranga

The country's regulatory environment continues to evolve to match international expectations. Since the enactment of Statutory Instrument 134 of 2019 by the Securities and Exchange Commission of Zimbabwe (SECZim), listed companies have been mandated to report on sustainability matters. Building on this foundation, the Zimbabwe Stock Exchange (ZSE) introduced core ESG disclosure metrics effective January 2024, setting a standardized benchmark for corporate environmental and social performance.

In 2025, the government's push for **ESG compliance** has intensified, with plans underway to introduce a **mandatory ESG policy** specifically for the mining sector.

In 2025, the government's push for ESG compliance has intensified, with plans underway to introduce a mandatory ESG policy specifically for the mining sector. The Mines and Minerals Amendment Bill, currently under stakeholder consultation, proposes legally binding Responsible Mining Standards, ensuring mining companies go beyond submitting production figures and actively report on environmental and social impacts.

However, it is market forces that are driving the urgency for ESG compliance even faster. International buyers, especially from the European Union and the United States, now require proof of responsible mining before accepting Zimbabwean minerals, particularly critical minerals like lithium. Failure to comply with international ESG standards threatens to exclude local miners from lucrative export markets.

Recognizing these global dynamics, forward-thinking companies are leading Zimbabwe's sustainability journey. Kuvimba Mining House, one of the country's largest mining groups, has

demonstrated its commitment to sustainable mining through a comprehensive ESG strategy. Kuvimba's operations emphasize environmental management, community upliftment, and transparent governance. Their sustainability initiatives include progressive rehabilitation of mined-out areas, community-driven agricultural projects, and significant investments in local education and healthcare infrastructure. Through these programs, Kuvimba is not only meeting ESG compliance requirements but also ensuring that its mining operations create lasting social and environmental value.

Similarly, Chinese investments in Zimbabwe's mining sector are increasingly aligned with Corporate Social Responsibility (CSR) expectations. New entrants such as Dinson Iron and Steel Company (DISCO) have been instrumental in boosting local development through targeted community projects, with several Chinese firms invested in rural electrification, borehole drilling, and school refurbishment programs.

Continued on page 47>>

These initiatives are not mere philanthropic gestures but strategic investments to strengthen relations with local communities, enhance social licenses to operate, and align with Zimbabwe's investment drive.

Dallaglio Investments, a key player in Zimbabwe's gold sector, offers another noteworthy example. Beyond regulatory compliance, Dallaglio has embedded ESG principles into its core business model through its Community Social Investment and Responsibility (CSIR) framework. Safety remains a top priority, with the company achieving significant milestones in occupational health and safety standards across its Pickstone-Peerless and Eureka gold mines. Dallaglio's CSIR programs focus on environmental rehabilitation, skills development, and enterprise support for local communities. These efforts not only mitigate operational risks but also contribute to long-term community resilience and sustainable economic development.

As Zimbabwe's miners embrace renewable energy solutions, initiatives such as DISCO's power projects highlight the sector's shift towards sustainable energy use. The company's 50MW thermal power plant, commissioned in early 2025, is already supporting steel production at Manhize, with surplus energy feeding into the national grid. Plans are also underway for a 20MW gas-fired plant and a 300MW hybrid energy project combining solar and thermal sources, reflecting DISCO's commitment to reducing its carbon footprint.

In the platinum sector, Zimplats continues to set benchmarks in ESG leadership. The company has launched large-scale solar energy projects aimed at powering its operations sustainably while investing in

advanced water recycling technologies to minimize environmental degradation. Unki Mine, certified under the Initiative for Responsible Mining Assurance (IRMA), has become a model of community-inclusive environmental monitoring, involving locals in air quality and emissions tracking to ensure transparency and build trust.

Mimosa Mining Company has also adopted robust stakeholder engagement practices through quarterly community forums, allowing for participatory decision-making on environmental and social concerns. These forums serve as platforms for validating ESG data, fostering transparency, and ensuring community voices are heard in corporate sustainability strategies.

Despite these positive strides, an ESG gap analysis by the Zimbabwe Environmental Law Association (ZELA) revealed that many mining companies still struggle with structured community engagement and comprehensive risk assessments. Often, community involvement is limited to the Environmental Impact Assessment (EIA) process, which historically suffers from low levels of inclusivity. For companies lagging behind, the lack of a clear stakeholder engagement plan remains a significant hurdle, hindering the credibility and transparency of their ESG reporting.

To bridge this gap, industry experts recommend adopting international best practices, such as the Global Reporting Initiative (GRI) standards, which provide frameworks for identifying material impacts, involving stakeholders, and enhancing transparency. Establishing dedicated community engagement forums, appointing liaison officers, and building local capacities for environmental monitoring are now viewed as essential steps for companies aiming to align with

both regulatory requirements and market expectations.

The government is also exploring the introduction of an ESG Tax, as outlined by legal experts from MMM Law Firm, to incentivize compliance while channelling resources towards community development and environmental protection. The recent launch of an ESG Handbook by Alexandra Mliswa in 2025 underscores the sector's collective commitment to aligning with global sustainability standards.

The convergence of regulatory frameworks, market demands, and voluntary corporate initiatives has made sustainability central to Zimbabwe's mining sector strategy. Companies that embed ESG principles into their core operations will not only secure access to international markets but also contribute to Zimbabwe's broader development agenda, driving inclusive growth and environmental stewardship.

As the mining sector continues to evolve, the leadership shown by companies such as Kuvimba, DISCO, Zimplats, Unki, Mimosa, and Dallaglio offers a blueprint for responsible mining in Zimbabwe. These examples demonstrate that sustainability is not merely about compliance but is a strategic imperative for business resilience, community empowerment, and long-term economic success.

In the global transition to green energy and responsible sourcing, Zimbabwe's mining sector stands at a critical juncture. By prioritizing ESG leadership and genuine stakeholder engagement, the country is well-positioned to redefine its place in the global mining value chain—not as a mere resource exporter, but as a model of sustainable and inclusive mining in Africa.



# Unki Commissions New Return Water Dam to Enhance TSF Safety and Sustainability

The country's third-largest platinum group metals (PGM) producer, Anglo American Platinum's Unki Mine, has successfully commissioned a Return Water Dam (RWD)—a key development in its ongoing efforts to strengthen environmental safeguards and operational resilience at its Tailings Storage Facility (TSF), according to its 2024 Sustainability Report.



By Rudairo Mapuranga

The newly completed RWD is part of Unki's broader sustainability and water management strategy, aimed at preventing waste discharges into downstream ecosystems and wetlands while enhancing water reuse and storage efficiency. Construction of the dam began in early 2023 and included extensive engineering works such as raising the dam wall, installing an emergency spillway, building a multilayer barrier system, and constructing a dissipation structure. For added security and safety, the dam has been fenced with lockable gates.

According to the 2024 Anglo-American Platinum Sustainability Report, the project

had several critical objectives:

- **Optimising water storage from the TSF to improve operational efficiency**
- **Reducing risks to human health, the environment, and nearby communities**
- **Cost-effectiveness through efficient design and material use**
- **Minimising environmental impact by eliminating discharges into sensitive ecological zones**
- **Mitigating storm impacts,**

**particularly in light of climate-induced extreme weather events**

- **Ensuring high reliability in water recapture and reuse**

The construction journey began with defect correction to ensure the structural integrity of existing components, followed by the installation of a full reticulation system before the 2024 commissioning.

This development marks another significant milestone for Unki, positioning it as a leader in responsible mining practices within Zimbabwe and the broader region. The RWD will not only support more sustainable tailings management but also align with Anglo American Platinum's commitment to environmental protection and community safety.

As global scrutiny on mine tailings and water usage grows, Unki's investment in infrastructure like the RWD reflects a proactive approach to risk management, compliance with international standards, and a deepening commitment to its social license to operate.



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# Zimbabwe's Gold Revenues Rebound in March as Exports Surge 13.5%

Zimbabwe's gold export earnings rebounded in March 2025, rising to US\$246.87 million—a 14% increase from February's US\$216.86 million—latest data from the Zimbabwe National Statistics Agency (ZimStat) has shown.



ZMF President Ms Henrietta Rushwaya

This marks the first rise since the record US\$361 million registered in November 2024 and comes amid a broader national export recovery.

By Ryan Chigoche

According to ZimStat, the country's total exports for March reached US\$581.9 million, representing a 13.5% increase from US\$512.6 million in February.

The improvement highlights Zimbabwe's growing export resilience despite local production challenges and global uncertainty.

The growth in March export earnings is attributed to improved mineral output, sectoral reforms, and export promotion incentives. Semi-manufactured gold led the way, accounting for 42.4% of total export value, followed by nickel mattes (16.5%) and processed tobacco (15.7%). These top three products made up nearly 75% of total exports, reflecting Zimbabwe's stronghold in mining and agriculture.

In the reported period, the United Arab Emirates (UAE) remained the top export destination, absorbing 40.7% of the country's goods, followed by South Africa (24.4%) and China (20.8%).

The concentration in these markets highlights deliberate efforts to build stable, high-value trade channels, with the UAE's dominance likely tied to the gold trade.

In the gold sector specifically, the rebound followed three months of declining

earnings, with figures dropping to US\$291.87 million in December, US\$291.49 million in January, and US\$216.86 million in February.

Despite favorable global gold prices, domestic setbacks such as power outages and mineral leakages had previously hampered production. March saw a 9% rise in gold output, from 2.6 tonnes to 2.8 tonnes, driven largely by an uptick in overall mining activity. First-quarter gold production climbed 40% year-on-year to 8.5 tonnes, indicating a positive start to 2025 for the sector.

Production in March was led by artisanal and small-scale miners, who contributed 1.9 tonnes—a 14% increase over February—accounting for 68% of total output. Large-scale miners produced 928 kg, a marginal rise from 927 kg the previous month.

Commenting on the stats Zimbabwe Miners Federation (ZMF) President Henrietta Rushwaya said,

"The continued rise in gold production by artisanal and small-scale miners is a clear testament to the resilience, hard work, and growing professionalism within our sector. A 14% increase in March alone reflects not only our commitment to national economic development but also the effectiveness of targeted support measures and improved access to formal markets. We are confident that small-scale miners will continue to drive Zimbabwe's gold sector forward and play a pivotal role in achieving the country's US\$7 billion

export target."

The uptick reflects how Zimbabwe's gold sector has responded to rising international prices, which hit a peak of US\$3,500 per ounce in April. In Q1 2025, gold prices surged by 40%, with the LBMA (PM) quarterly average climbing to US\$2,860/oz, up 38% year-on-year. The global rally has been fuelled by geopolitical tensions, including the Russia-Ukraine and Israel-Hamas conflicts, as well as renewed US-China trade frictions.

Despite these tailwinds, large-scale producers have continued to grapple with structural challenges. Caledonia Mining revised its 2025 production forecast down to 74,000–78,000 ounces, from over 80,000 ounces in 2022, amid a US\$309 million investment into the Bilboes project.

RioZim, plagued by outdated equipment and declining ore quality since 2021, has also seen falling output. Meanwhile, Kuvimba Mining House has focused on mine-life extension, which has limited current volumes. These issues, compounded by infrastructure bottlenecks, have prevented major players from fully capitalising on high global prices.

Still, the outlook remains positive. Kuvimba is targeting 3,600 kg in FY2025, with Freda Rebecca Mine having already delivered 2,123 kg in the first 10 months. Padenga Holdings is projecting 100,000 ounces, buoyed by increased production at its Eureka and Pickstone mines.

While Zimbabwe recorded a trade deficit of US\$228 million in March, up from US\$217.9 million in February, rising export receipts from gold and other key commodities suggest improving fundamentals. Imports totalled US\$809.9 million, a 10.9% increase from the prior month.

With exports growing and gold earnings regaining momentum, Zimbabwe appears to be back on track to meet its US\$7 billion export target by year-end, as outlined in the National Export Strategy. Sustaining this recovery will depend on continued investment in the mining sector and broader economic stability.



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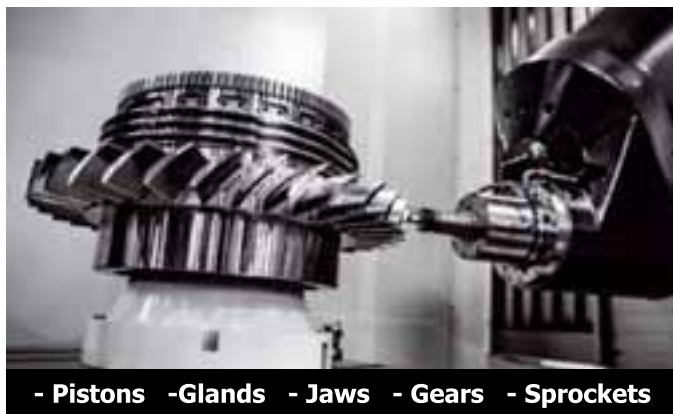
### 2. Prototype machining

CNC prototyping is a fast, precise, and cost-effective method for developing product designs before mass production. It allows manufacturers to create functional prototypes with high accuracy, ensuring that designs meet specifications before committing to large-scale manufacturing. CNC machines can work with various materials, including metals, plastics, and composites, making them versatile for different industries.

Additionally, CNC prototyping enables rapid iterations, allowing engineers to refine designs quickly without expensive tooling changes.

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CNC machining promotes sustainability by reducing material waste, conserving energy, and enhancing manufacturing efficiency. Its precision cutting ensures minimal scrap and operation with optimised energy usage, lowering power consumption. Additionally, CNC processes emit fewer pollutants than traditional methods, and excess materials can be recycled or repurposed, contributing to a circular economy. By supporting eco-friendly material choices, CNC machining plays a crucial role in environmentally responsible production.



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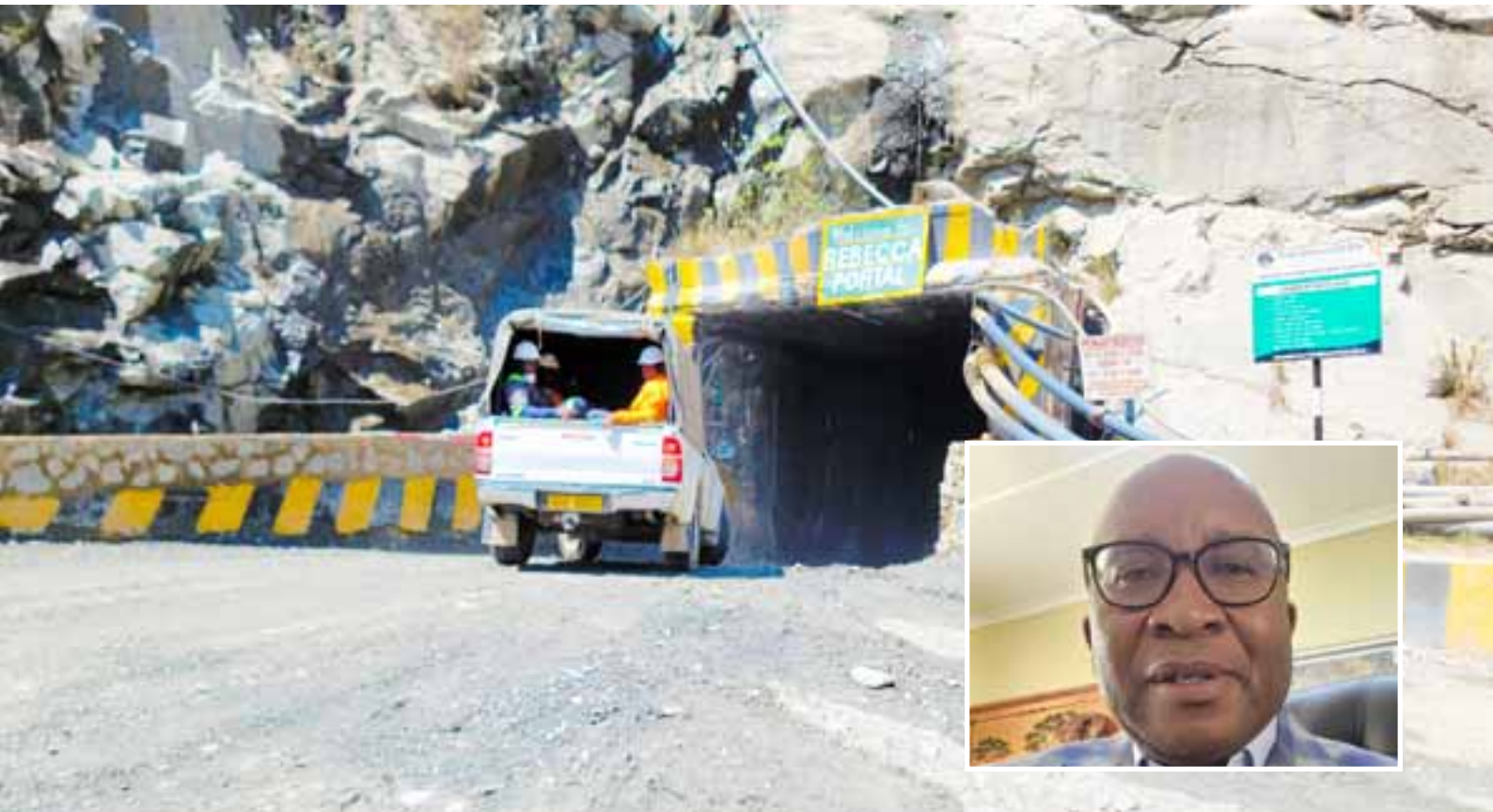


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# Kuvimba Gold Cluster Prioritises ESG with \$350,000 CSR Budget and Local Enterprise Empowerment

Kuvimba Mining House's Gold Cluster has placed Environmental, Social, and Governance (ESG) principles at the centre of its operational philosophy, setting aside US\$350,000 from profits before tax for Corporate Social Responsibility (CSR) projects for the financial year ending March 2026.



**Patrick Maseva-Shayawabaya, the Head of the Gold Cluster, explained that Kuvimba's CSR strategy focuses on health, education, and youth and community development, with tangible projects already underway.**

Speaking during a media tour at Freda Rebecca Mine in Bindura, Patrick Maseva-Shayawabaya, the Head of the Gold Cluster, explained that Kuvimba's CSR strategy focuses on health, education, and youth and community development, with tangible projects already underway.

By Rudairo Mapuranga

"We have consciously set aside a percentage of our profits for CSR, and this year that amounts to US\$350,000. This fund will be channelled into impactful projects such as the expansion of the maternity ward at Bindura Hospital and renovations at Mvundisu School in Mwishinga," he said.

While final budgets for individual projects like the maternity ward are yet to be confirmed, Kuvimba has committed to completing the facility and fully furnishing it to support maternal health in the region.

In addition to health and education, the cluster is also promoting Local Enterprise Development, aiming to capacitate young entrepreneurs to become suppliers of goods and services for mine operations.

"I recently met with the provincial minister and agreed to furnish him with a list of goods and services that our operations require and which could be manufactured locally," he revealed. "We'll assist potential entrepreneurs with access to capital and skills training to help them become consistent, high-quality suppliers."

This initiative is expected to stimulate local economic growth and create sustainable livelihoods in mining host communities, aligning with the cluster's vision of inclusive development.

Moreover, the company has introduced several mine safety improvements, including remote-controlled machinery for underground operations and ongoing employee safety talks. These innovations are not only about operational efficiency but also about ensuring the well-being of the workforce — the backbone of Kuvimba's success.

By anchoring its operations in responsible mining and social investment, Kuvimba's Gold Cluster is proving that profitability and sustainability can coexist.



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# Insuring your Gold Mining operations

Gold mining remains a vital component of Zimbabwe's economy, with the country producing a record 36.48 tonnes in 2024 and aiming for 40 tonnes in 2025. While gold mining offers significant financial opportunities, it also presents substantial risks.



Dump trucks at Freda Rebecca mine>>

For companies in the gold sector, effective risk management is important. Mining is one of the most critical and high-risk industries globally. From exploration and extraction to construction and production, each stage of mining is accompanied by significant risks, ranging from environmental damage to equipment breakdowns and workforce safety hazards. Mining insurance is an essential tool for mitigating these risks and ensuring that your operations remain financially sustainable in the face of unexpected events.

## Selecting the correct level of mining insurance

When selecting mining insurance, it's essential to work with insurance experts like Firstlink that understand the unique risks and challenges of the mining industry. Some general factors to consider though are:

**1. Location of Operations:** A mine in a remote isolated area has certain higher risks that face it compared to one located in or close to a well-populated city with access to amenities.

**2. Type of Mining:** The risks associated with underground mining differ from those in open-cast mining so your policy must be tailored to the specific type of operation.

**3. Size and Scope of Operations:** Larger operations require more comprehensive coverage to protect a wide range of assets, equipment, and employees compared to smaller operations.

**4.Environmental Impact:** Operations with significant environmental exposure such as those linked to alluvial mining should prioritize environmental liability insurance to protect against legal claims.

## Main Risks Covered by Mining Insurance

### 1. Property Damage and Business Interruption

Expensive equipment and infrastructure is susceptible to damage due to fire, accidents, natural causes or theft. Insurance policies covering property damage ensure that the company can replace or repair damaged assets, minimizing operational downtime. Business Interruption insurance will cover the loss on insurable gross profit or extra costs for maintaining production that are incurred during downtime of main machinery or plant.

### 2. Machinery Breakdown

Mining machinery is subject to sudden and unforeseen breakdowns, and malfunctions. Machinery Breakdown insurance provides coverage for repair or replacement, ensuring that production does not suffer due to equipment failure.

### 3. Bullion Insurance

Bullion insurance covers against the loss of mined gold at an insured site or in transit. The 'all risk' cover provides physical loss or damage protection, inclusive of theft and transit risks.

### 4. Workforce Injuries and Safety

The mining industry poses significant hazards to workers, including accidents, falls, and exposure to hazardous materials. Group Personal Accident insurance covers medical expenses, lost wages, and provides a death and permanent disability benefit if employees are injured on the job.

### 5. Bonds and Guarantees

Various types of Bonds and Guarantees assist miners in managing cash flows. A Customs bond can allow a miner to get in mining supplies without paying duty at day one but only as and when the supplies are taken from the bonded warehouse for use in the operations. If a new mine wants to build its plant and seeks out a loan from banks, at times it maybe difficult to get one unless there is some form of insurance guarantee or debtors insurance. Other covers such as Advance Payment Import policy, Export Credit Insurance and much more are available to assist miners in various ways to bridge funding gaps, attract investment, or secure credit.

### 6. Other conventional mining operational risks.

These include other covers such as Motor Insurance, Electronic Equipment, Liability insurance and much more.

Investing in mining insurance is not just about compliance; it's a strategic decision that offers peace of mind, enhances investor confidence, and protects valuable assets from unforeseen events.

At Firstlink we assist mining entities and related companies to structure adequate cover for their operations. Our clients also benefit from our bespoke 360° Risk Management service.

Talk to us today on

**(0242)744048/79,  
0772434103,  
0772392075 or  
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Tichaona Chihambakwe is the Head of Business Development and Marketing for Firstlink Insurance Brokers.

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