Dialogue Online

"The elders sit under the big tree and talk until they agree... talking until you agree (or agree to disagree) is the essential (essence) of the traditional African concept of democracy..."
Julius Nyerere

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Africa's Critical Minerals – the Missing Voice at the G20 Table

Introduction

Over the past decades, Africa's natural resources, and especially its critical minerals, have been the focus of considerable global attention. Africa, with South Africa's platinum group metals (PGMs) reserves, the Democratic Republic of Congo's (DRC) position as the world's leading cobalt producer, and Zimbabwe's expanding lithium industry, is a cornerstone of the global critical minerals supply chain. Africa holds

nearly 30% of the world's critical mineral reserves, including cobalt, lithium, and platinum resources essential for technology, clean energy, and industrial development.[1] Yet, decisions about how these minerals are priced, processed, and integrated into global markets are largely made in G20 boardrooms, often with limited input from African capitals.

Paradoxically, these same resources have often been a source of instability, fuelling conflict, the displacement of millions, and the loss of countless lives. Despite decades of mining, much of Africa still struggles with weak infrastructure, limited investment in mineral processing, poor labour conditions, and restricted access to the true economic gains of its resources. This imbalance persists, because global supply chains remain dominated by a handful of industrialised economies that capture most of the benefits. Consequently, resource-rich African countries continue to export their minerals in raw form, forfeiting the jobs, revenue, and industrial growth that should accompany such wealth. The cycle of extraction without effective natural resource management reinforces poverty and inequality, undermining the continent's developmental potential.

Against this backdrop, South Africa's G20 presidency has placed *'Harnessing critical minerals for inclusive growth and sustainable development'* as a central priority. This presents the G20, alongside influential actors such as the EU, with a pivotal opportunity to reshape the governance of critical minerals, forging fairer partnerships that emphasise local beneficiation, job creation, and long-term sustainability in resource-rich African states. This article explores Africa's critical minerals landscape and the challenges of natural resource management in Africa, and provides recommendations on how the South African G20 presidency can promote inclusive governance of critical minerals.

Africa's critical minerals landscape

Africa is entering a pivotal moment, wherein its rich critical mineral reserves could redefine both its global influence and its developmental trajectory. The continent possesses significant shares of key critical minerals, including 55% of the world's cobalt, 47.65% of manganese, 21.6% of natural graphite, 5.9% of copper, 5.6% of nickel, 1% of lithium, and 0.6% of iron ore globally.[2] These critical minerals are essential for technologies ranging from electric vehicles and electronics, to medical devices and energy systems. Among the many mineral-rich countries in Africa, South

[1] Www.gov.za. (2025). Minister Gwede Mantashe: G20 Critical Minerals Stakeholder Engagement South African Government. Available at: https://www.gov.za/news/speeches/minister-gwede-mantashe-g20-critical-minerals-stakeholder-engagement-29-jul-2025 [Accessed 15 Sep. 2025].

[2] Laura Nicholson (2025). *Africa must chart its own course in the global mineral landscape*. [online] IOL. Available at: https://iol.co.za/business-report/economy/2025-01-24-africa-must-chart-its-own-course-in-the-global-mineral-landscape/ [Accessed 18 Sep. 2025].

Africa, the DRC, and Zimbabwe play particularly prominent roles in supplying the global market.

South Africa

South Africa dominates the global platinum group metals (PGMs) sector, holding around 80% of reserves and supplying major shares of platinum, yttrium, manganese, chromium, and vanadium.[3] PGMs are the top contributor to the country's mining revenues and play a key role internationally in clean energy technologies, such as fuel cells for electric vehicles and hydrogen systems. This positions South Africa as a central player in supporting the global transition toward sustainable energy solutions.

The Democratic Republic of Congo (DRC)

The DRC is the world's leading source of cobalt, holding over half of global reserves (about 6 million out of the total 11 million metric tons). In 2023, it produced 170,000 metric tons, with output expected to rise to 222,000 metric tons by 2024. [4] In the DRC, most cobalt mining is operated by large international and local companies such as Wanbao Mining, Shalina Resources, Gecamines, Glencore, and Jinchuan Group, highlighting the country's growing role in supplying this critical mineral for batteries and clean energy technologies.

Zimbabwe

Zimbabwe has the largest lithium reserves in Africa, estimated at around 11 million tons, and is ranked as the sixth largest lithium producer in the world.[5] Lithium is a key material for batteries used in electric vehicles, smartphones, and renewable energy storage. The country's lithium projects have also attracted significant investment from Chinese companies, reflecting China's strong interest in securing these supplies.

The challenges facing natural resource management in Africa

With significant reserves across the continent, Africa's critical minerals are not only major economic drivers but also central to global geopolitics, particularly as much of their processing and value capture remains controlled by industrialised economies in the Global North. Yet, despite these vast reserves, systemic barriers prevent the continent from fully benefiting, leaving over 730 million people, mostly in rural areas,

[3] https://www.facebook.com/anine.kilian (2024). *9 African Countries with the Most Critical Minerals*. [online] Energy Capital & Power. Available at: https://energycapitalpower.com/african-countries-most-critical-minerals/.

[4] https://www.facebook.com/anine.kilian (2024). *9 African Countries with the Most Critical Minerals*. [online] Energy Capital & Power. Available at: https://energycapitalpower.com/african-countries-most-critical-minerals/.

[5] https://www.facebook.com/anine.kilian (2024). *9 African Countries with the Most Critical Minerals*. [online] Energy Capital & Power. Available at: https://energycapitalpower.com/african-countries-most-critical-minerals/.

without reliable access to energy and highlighting the persistent challenge of energy poverty.[6]

Resource Curse, Conflict and Instability

Resource extraction in Africa has often had a destabilising effect locally, giving rise to terms such as the "resource curse", to describe this phenomenon. Countries rich in natural resources frequently become more prone to corruption, authoritarianism, and conflict, while falling behind in terms of development. These vast resources have also fuelled conflict and instability in parts of Africa. In the DRC, for example, competition over natural resources has contributed to displacement, human rights abuses, and violence, particularly over coltan - a key source of tantalum, which has driven instability in the country's Eastern region for roughly three decades. This climate of instability also discourages investment from states and companies seeking transparency and fair, long-term partnerships.[7] Furthermore, while cobalt mining in the DRC is dominated by large international and local companies (such as those listed above), around 12% of cobalt production comes from artisanal and small-scale mining - where individuals or small groups mine by hand, often in unsafe conditions. This combination of large-scale corporate control and informal mining highlights governance and safety challenges that persist in resource management.

Limited Physical Infrastructure

Furthermore, many countries in Africa still lack the necessary infrastructure to harness and benefit from their resource wealth. Basic requirements such as reliable electricity, water systems, transport networks, and communication services are often either absent or poorly maintained. In the DRC, for example, electrification rates are very low, most infrastructure is outdated or nonfunctional, and transport networks remain underdeveloped.[8] These problems are not unique to the DRC, but are common across

[6] JENTEL, L. and CLOETE, D. (2025). Digging Deeper: Embedding Minerals Sovereignty in Africa's Mining Value Chains . *Policy Insights* 161. Available at: https://saiia.org.za/wp-content/uploads/2025/02/PI-161-FP-Jentel-Cloete-CORRECTED-VERSION.pdf.

[7] Africa's Critical Minerals at a Critical Juncture. (2025). Available at: https://africacenter.org/wp-content/uploads/2025/06/Africas-Critical-Minerals.pdf [Accessed 18 Sep. 2025].

[8] Africa's Critical Minerals at a Critical Juncture. (2025). Available at: https://africacenter.org/wp-content/uploads/2025/06/Africas-Critical-Minerals.pdf [Accessed 18 Sep. 2025].

other African states with major mining potential, limiting their ability to benefit fully from their resources.

Limited Industrial Capacity and Skilled Workforce

Another challenge limiting Africa's ability to benefit fully from its resource wealth is the continent's limited industrial capacity and skilled workforce. Some African countries have made efforts to address this by implementing policies requiring foreign companies to process minerals locally. However, these measures often fail due to insufficient industrial infrastructure and a lack of trained personnel. For example, the Zimbabwean government required mining companies (mostly Chinese) to submit plans for refining lithium locally by March 2024. However, this could not be implemented in practice, because the country lacked the industrial capacity and skilled workforce to fully process the mineral.[9] As a result, companies were only able to localise the step of crushing of the lithium-bearing rocks to produce lithium concentrate for export - which is still a raw material. Consequently, Zimbabwe continues to export mostly unprocessed lithium instead of higher-value products.

Recommendations:

During its G20 presidency, South Africa has made *'Harnessing critical minerals for inclusive growth and sustainable development'* a priority, and placed critical minerals under the task force on inclusive economic growth, employment, industrialisation, and reducing inequality. Positioning the issue within the economic growth agenda allows South Africa to advocate for local mineral processing (beneficiation) and to ensure that producer countries in the Global South receive fairer shares of the benefits.[10] To promote inclusive governance of critical minerals, the South African G20 presidency should foster partnerships that ensure benefits are shared equitably across the

[9] Africa's Critical Minerals at a Critical Juncture. (2025). Available at: https://africacenter.org/wp-content/uploads/2025/06/Africas-Critical-Minerals.pdf [Accessed 18 Sep. 2025].

[10] Wolinski, S.J. (2025). *Critical Minerals and South Africa's G20 Strategy - Georgetown Journal of International Affairs*. [online] Georgetown Journal of International Affairs. Available at: https://gjia.georgetown.edu/2025/09/15/critical-minerals-and-south-africas-g20-strategy/.

continent. It should also encourage foreign firms operating in Africa to uphold high standards of corporate responsibility, comply fully with local laws, and actively mitigate the social and environmental impacts of extraction. Promoting these practices will help build stable, equitable, and mutually beneficial partnerships between companies and African communities, ensuring that the continent's resource wealth contributes to inclusive development. The G20 should encourage African countries to invest in research and development, strengthen industrial capacity, and develop the skills and technologies needed for local mineral processing. Lastly, it should support long-term investment in human capital in Africa through mutually beneficial international partnerships. These collaborations should prioritise training and knowledge transfer to strengthen African countries' capacity to add value to their mineral resources and promote sustainable, inclusive development.

About the Southern African Liaison Office:

The Southern African Liaison Office (SALO) is a South African-based not-for-profit civil society organisation which, through advocacy, dialogue, policy consensus and in-depth research and analysis, influences the current thinking and debates on foreign policy especially regarding African crises and conflicts.