



**KEY FIGURES AND FACTS**

# **IN AFRICAN MINING FOR 2024**

**BY STRATEGIES!**

- The exploitation of natural resources in general, and mining resources such as diamonds in particular, remain one of the most important issues for peace, security and development in many African countries.
- If these resources are to serve the sustainable well-being of the people, it is vital that the governance of African states is equal to the challenges, both internal and external, old and new.
- With a view to contributing to these changes in governance, STRATEGIES! has been supporting and advising players in the governance of natural resources in Africa for several years.
- This edition of macro-trends aims to introduce the public to some data on the subject of mining governance in particular and the governance of natural resources in general.
- It also offers a summary version of our concept of the Functional State in Africa, the construction of which should be the horizon and compass for all current private and public initiatives in the field of natural resource exploitation.





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Part 1

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**Overview of Africa's  
Strategic Minerals  
Potential**

01

Africa holds between **20%** and **90%** of the world's reserves of 11 minerals needed for the energy transition.

02

Africa accounts for **40%** of the world's gold reserves, **30%** of its mineral reserves and **12%** of its oil reserves.

03

Africa holds **19%** of the world's reserves of metals needed to make a standard battery-powered electric vehicle.

## LES RESSOURCES NATURELLES DE L'AFRIQUE

Une part importante des ressources naturelles de la planète se trouve dans le sol des pays africains : un espoir pour l'avenir du continent



- Le continent compte de nombreux minerais nécessaires pour la fabrication de nombreux produits que nous utilisons tous les jours, comme le pétrole, le gaz naturel, les diamants, l'or, l'uranium, le cobalt, le platine, le fer, le cuivre ou encore le tantale
- L'Afrique, dont les ressources ont longtemps été exploitées par les pays colonisateurs, fait aujourd'hui l'objet des convoitises des grandes sociétés qui veulent accéder à ces richesses naturelles

# Minerals needed for the energy transition held by Africa

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## WORLD RESERVES

Platinum group metals : **90%**

Phosphate : **80%**

Manganese : **55%**

Cobalt : **44%**

Ilmenite and Yttrium : **43%**

Chromium : **40%**

Vanadium : **30%**

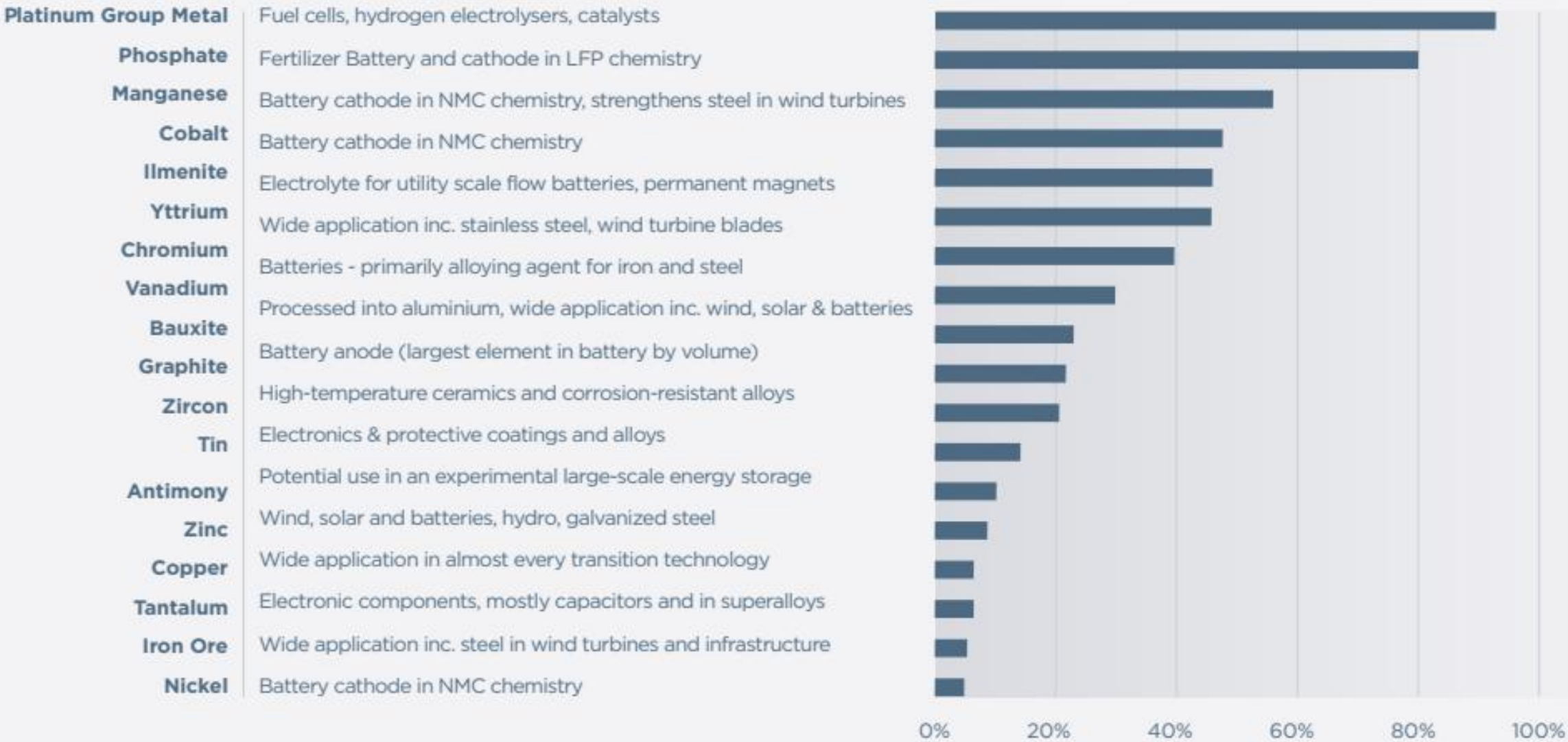
Bauxite : **22%**

Graphite : **21%**

Zircon : **20%**

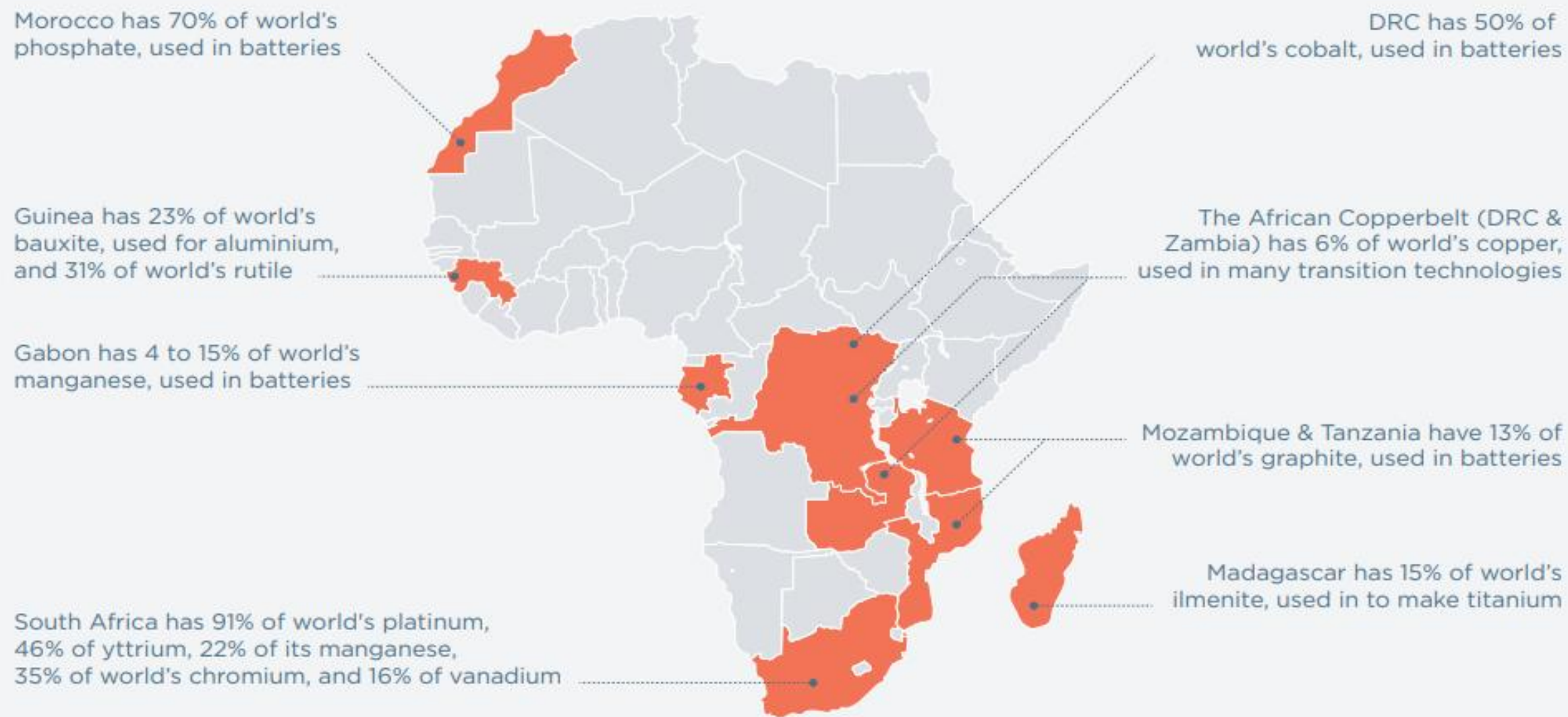


**Figure 1. Africa's shares of global reserves of transition minerals<sup>22</sup>**



**Africa's share of global mineral reserves**

**Figure 4. African countries with large shares of global transition mineral reserves<sup>37</sup>**





Part 2

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## Diamond production data

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# Top 10 African Diamond Producing Countries in 2022

Rank	Country	Production volume	Value (\$)
1	Botswana	24,509,939.00	\$4,700,321,539.00
2	Democratic Republic of Congo	9,908,997.66	\$64,959,638.25
3	South Africa	9,660,233.00	\$1,538,930,037.97
4	Angola	8,763,309.30	\$1,965,247,499.47
5	Zimbabwe	4,461,450.15	\$423,612,395.43
6	Namibia	2,054,227.06	\$1,234,496,934.12
7	Lesotho	727,736.95	\$314,358,893.67
8	Sierra Leone	688,970.20	\$142,907,210.45
9	Tanzania	375,533.14	\$110,936,767.64
10	Guinea	128,770.65	\$6,556,170.10

Country	World Rank
Botswana	2 <sup>nd</sup>
Democratic Republic of the Congo	4 <sup>th</sup>
South Africa	5 <sup>th</sup>
Angola	6 <sup>th</sup>
Zimbabwe	7 <sup>th</sup>



# Industrial Production vs Artisanal Diamond Production in 2023 (in volume)

Industrial diamond production worldwide reached **132.7 million carats in 2023**, up 2.2% from 2022.

The top industrial diamond producers in 2023 were:

- Russia (32.94%)
- Botswana (19.11%)
- Canada (14.84%)
- The Democratic Republic of the Congo (10.93%)
- South Africa (8.18%)



# Industrial Production vs Artisanal Diamond Production in 2023 (in volume)

Artisanal diamond production is mainly concentrated in Africa, particularly in Central and Southern Africa.

West Africa also has a smaller proportion of artisanal diamond producers.



# Industrial Production vs. Artisanal Diamond Production in 2023 (In Value)

The value of diamond production worldwide reached **\$200 billion in 2023**, up 2.5% from 2022

- Industrial production: **\$160 billion in 2023**
- Artisanal production: **\$40 billion in 2023**



Part 3

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## The Kimberley Process Certification Scheme

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# History of the Kimberley Process

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## 2000

- May: Meeting of Southern African diamond-producing countries in Kimberley.
- Decision to establish an international certification system.

## 2003

January: KPCS comes into force

## Since 2003

- The Kimberley Process has been extended to new countries,
- Certification system has been strengthened to fight the trade in blood diamonds.

## 2002

November: Kimberley Process Certification Scheme (KPCS) adopted by 45 countries

## 2004

The Kimberley Process became an intergovernmental organization



# The Kimberley Process certification system

1

The Kimberley Process Certification Scheme (KPCS) was created in 2003 to prevent the trade in conflict diamonds, i.e. rough diamonds used to finance wars waged by rebel groups.

2

The KPCS aims to ensure that rough diamonds are mined and traded legally and ethically, avoiding human rights abuses and the financing of armed conflict.



1

The KPCS has significantly reduced the trade in conflict diamonds from around 15% of the world's rough diamond trade in 1999 to less than 1% today.

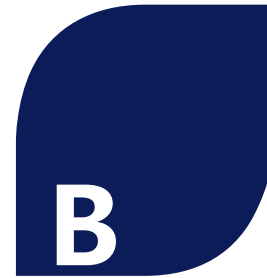
2

It has also helped to increase transparency, traceability and accountability in the diamond sector, and to support sustainable development and peace in diamond-producing countries.

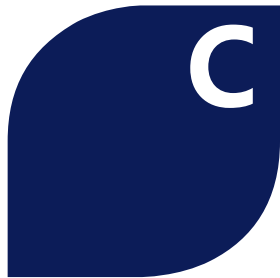


# KPCS Challenges

The limited definition of conflict diamonds, which excludes human rights violations committed by non-state actors or government forces



Weak internal controls in some participating countries, which allow illicit or fraudulent diamonds to infiltrate



The need to adapt the KPCS to technological developments, such as synthetic diamonds and verification tools

The effective participation of civil society and the diamond industry, which are often marginalised or insufficiently involved in the process





## Part 4

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**Overview of some initiatives to improve mining governance in Africa**

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# Apart from well-known initiatives such as...

- Le Processus de Kimberley/ KP
- L' ITIE/ EITI
- Publish What You Pay
- Et d'autres initiatives de la société civile.../And other civil society initiatives...

# At the level of the African Union

## Africa Mining Vision (AMV)

Launched in 2009, the VMA is a strategic framework for achieving Africa's goal of inclusive and sustainable development.

It is an initiative that aims to promote transparent, equitable and optimal mining in Africa, and broad-based development that benefits all people.

1

## African Mining Development Centre (AMDC):

AMDC supports African states in their efforts to improve natural resource governance.

AMDC is an initiative of the African Union, the African Development Bank and the Economic Commission for Africa.

2

## The African Governance Report:

It is a publication of the African Union, specifically the African Peer Review Mechanism (APRM) in collaboration with the African Governance Architecture (AGA).

This report assesses the state of governance in Africa to provide Member States with a comprehensive baseline to help them improve their governance.

3

# At the regional level

## The International Conference of the Great Lakes Region (Central Africa)

- The ICGLR Protocol on the Illegal Exploitation of Natural Resources adopted in 2000
- The Regional Natural Resources Certification Mechanism (RCM) adopted in 2012.
- The ICGLR Regional Initiative on Combating the Illegal Exploitation of Natural Resources launched in 2016.
- The ICGLR Regional Programme on Transparency and Accountability in the Extractive Industries launched in 2018.

## CEEAC (Central Africa)

- The ECCAS Charter on Natural Resource Governance, adopted in 2012, which sets out the principles and objectives of ECCAS in the governance of natural resources.
- The ECCAS Mining Code, adopted in 2017, which establishes a harmonized legal framework for mining in ECCAS member states.
- The ECCAS Protocol on Combating the Illegal Exploitation of Natural Resources, adopted in 2020, which aims to combat the illegal exploitation of natural resources in the region.

# At the regional level

## SADC (Southern Africa)

- The SADC Charter on Natural Resource Governance, adopted in 2008, which sets out SADC's principles and objectives for natural resource governance.
- The SADC Mining Code, adopted in 2012, which establishes a harmonized legal framework for mining in SADC member states.
- The SADC Protocol on Combating the Illegal Exploitation of Natural Resources, adopted in 2018, which aims to combat the illegal exploitation of natural resources in the region.

## CEDEAO (West Africa)

- The ECOWAS Charter on Natural Resource Governance, adopted in 2014, which sets out ECOWAS' principles and objectives for natural resource governance.
- The ECOWAS Mining Code, adopted in 2017, which establishes a harmonized legal framework for mining in ECOWAS member states.
- The ECOWAS Protocol on Combating the Illegal Exploitation of Natural Resources, adopted in 2019, which aims to combat the illegal exploitation of natural resources in the region.



5

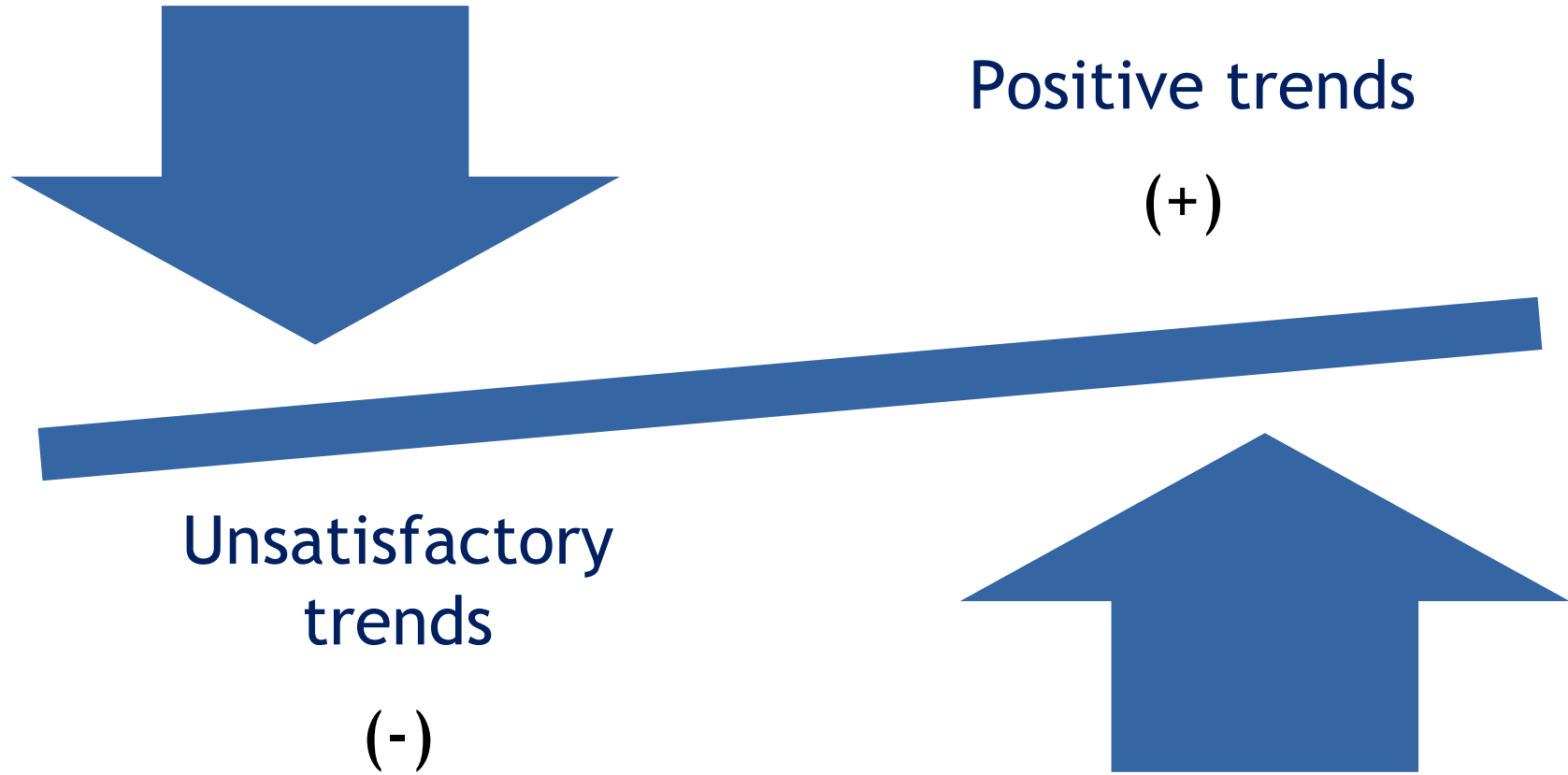
Part 5

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## Key Trends in Mining Governance in Africa

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# Two types of trends



# Positive trends in mining governance in Africa over the past 10 years



## **Growing Awareness:**

There is a growing awareness of the importance of good governance in the mining sector in Africa.

Governments, mining companies and international organizations recognize the importance of transparency, accountability and stakeholder participation to ensure sustainable mining that benefits local communities.



## **Transparency Initiatives:**

Initiatives such as the Extractive Industries Transparency Initiative (EITI) have been put in place to promote transparency in the mining sector.

There are also regional and continental initiatives, such as the African Mining Vision or the Mining Code of the Economic Community of West African States.

These initiatives promote the disclosure of mining revenues, the responsible management of resources and the fight against corruption.



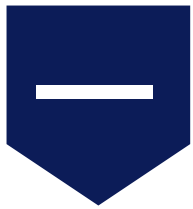
## **Increased regulation:**

African governments have tightened their regulations to promote responsible mining.

This includes the adoption of stricter environmental, social, and fiscal laws and regulations to protect the rights of local communities and minimize negative impacts on the environment.



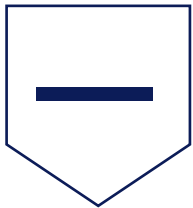
# Unsatisfactory trends in mining governance in Africa over the past 10 years



## Opacity and corruption:

Despite efforts to promote transparency, opacity and corruption persist in some mining sectors in Africa.

Opaque mining contracts and corrupt practices can lead to mismanagement of resources and deprive local communities of the economic benefits of mining.

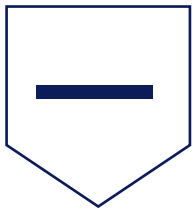


## Conflict and Human Rights:

In some areas, mining has been associated with conflict and human rights violations.

Land conflicts, illegal exploitation of resources and abuses of workers' rights are persistent problems in some African countries.

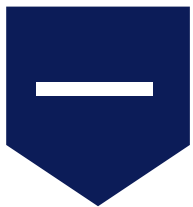
# Unsatisfactory trends in mining governance in Africa over the past 10 years



## **Economic dependence:**

Excessive economic dependence on the mining industry leads to economic vulnerability to fluctuations in mineral prices or resource depletion.

It can also lead to excessive concentration of revenues in the hands of a small number of actors, to the detriment of broader economic development.

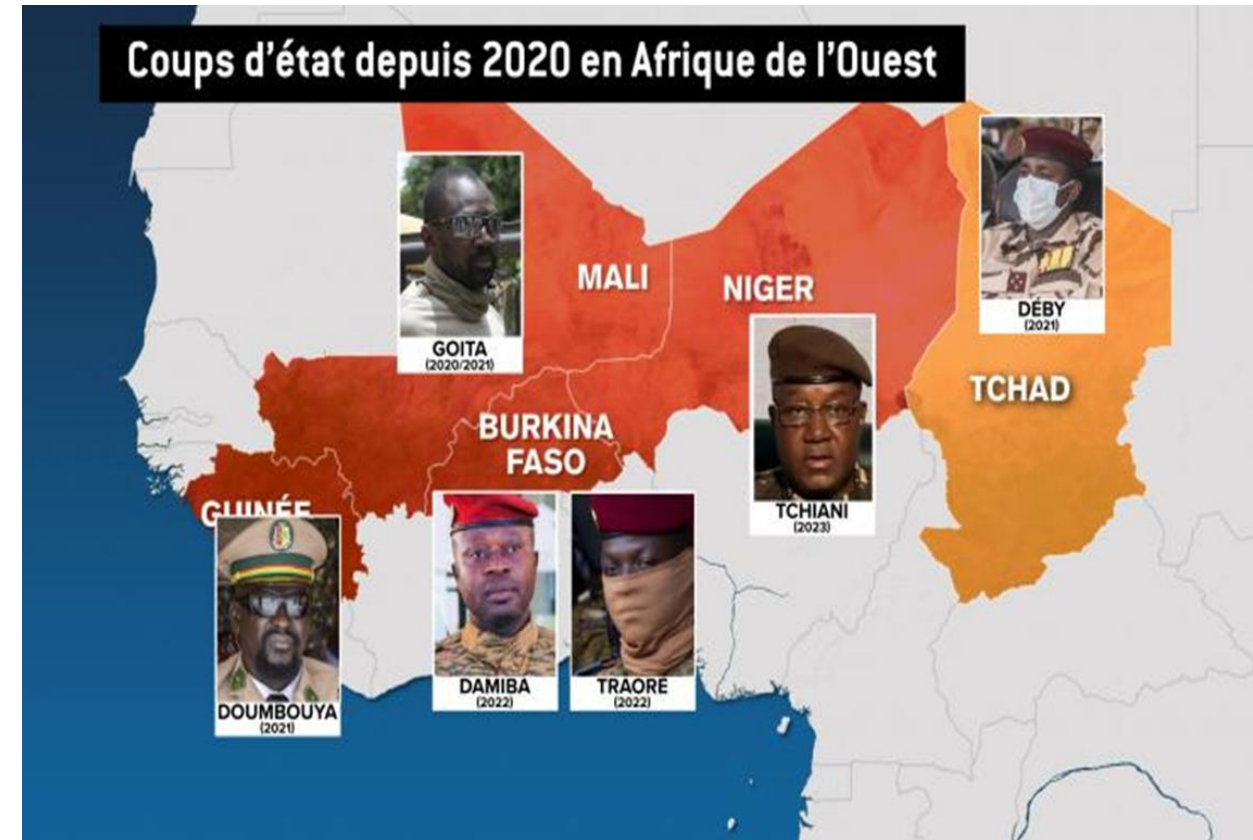


## **Institutional and technical weakness:**

Weak institutional and technical capacity, which limits the ability of states to negotiate fair contracts, control mining activities, and manage social and environmental impacts.

# The particular challenge of the Sahel countries in transition

- 05 Sahelians in transition:  
Mali, Guinea, Burkina Faso, Chad and Niger.
- All these countries are rich in natural resources in general, mining in particular.
- Apart from Chad, all these countries say they want to break with the governance of the past.
- This disruption must also take place in the mining sector, which their authorities say they want to reform for the good of the population.
- It will be very important to act to ensure that these reforms are sustainable and benefit the people.





## Part 6

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# The Functional State in Africa: Key to the Overall Improvement of Governance and People's Living Conditions

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To improve mining governance, at a minimum,



1

Enhancing  
transparency

2

Involving local  
communities

3

Strengthening  
regulation

4

Strengthening  
Institutional  
capacity

5

Fighting  
corruption

**THIS IS NOT POSSIBLE WITHOUT A FUNCTIONAL STATE!**

# The functional state rests on at least three pillars



# A functional state is capable of providing:

## **PRESENCE**

The existence of the State throughout the national territory, which is manifested in the provision of basic services to citizens: water, electricity, health care, education, security, transport, etc.

## **SAFETY & SECURITY**

The assurance of the safety and security of the citizen, manifested by: respect for fundamental human rights, a functioning judicial system, state security services that protect the well-being of the citizen, the presence and action of citizens' collectives such as the media, trade unions, civil society...

## **HOPE**

The management of a sustainable growth economy that creates decent jobs for the majority, space and resources for art and culture, space and resources to develop and scale innovation. Sustainable management of nature in all activities.

# Conditions for a Functional State to Perform Its Functions

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## Political will

a desire and vision that manifests itself in measures and systems to report at the highest level on impact, results and resources.

## Strategy

clear definition of short-, medium- and long-term objectives based on the actual data of the situation as well as the alignment of the objectives, competences and resources of the State.

## Competence

technical ability to develop, implement, measure impact and results as well as continuously improve a strategy.

## Resources

ability to mobilize the country's internal resources and use the vast majority of them to implement its national strategies. Absence of corruption and active fight against corruption and mismanagement.

- Improving diamond governance in particular and mining governance in general requires the building of functioning states in Africa.
- Without Functional States, there can be no sustainable improvement in the well-being of mine-affected communities in particular, and the populations of African countries in general.



**What if we dared to work for the  
construction of Functional States in Africa?**

# OUR SERVICES

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## IMPROVING MINING GOVERNANCE

- Ensuring the effectiveness of mining certification mechanisms
- Strengthening national mining frameworks
- Improving governance in specific mining value chains
- Analyzing trends in the mining sector

## STRENGTHENING ECONOMIC GROWTH

- Improving management of mining revenue for States
- Creating decent jobs in the mining sector
- Ensuring economic growth while respecting human and environmental rights
- Improving benefits to African communities and countries as they partner on critical minerals

## MAINSTREAMING GENDER IN MINING

- Strengthening networks of women in mining
- Developing FDP/Gender policies in mining
- Ensuring decent jobs for women and youth

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## About the authors

This document is produced by *STRATEGIES!*. A consulting firm based in Douala, Cameroon. *STRATEGIES!* specializes in leadership and management and delivers its services in Africa, Europe and the United States.

*STRATEGIES!* supports private companies as well as national and international public institutions. The firm is 28 years and is run by CEO, Kah Walla.

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