Towards a Zimbabwean Lithium Industry

An Analysis of Japanese and Chinese Responses to Zimbabwe's Critical Minerals Policy

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Terms and Abbreviations

AfCFTA	African Continental Free Trade Agreement
FOCAC	Focus on China-Africa Conference
JETRO	Japanese External Trade Organisation
JICA	Japan International Cooperation Agency
Kanzai ittaishugi	Government and business working in unison
Keideran	Japan Federation of Economic Organisations
ODA	Official Development Assistance
TICAD	Tokyo International Conference on African Development

Recommendations

This report his report focuses on Zimbabwe's lithium industry which is subject to the country's relatively new critical minerals policy. I focus on how Chinese and Japanese firms are reacting towards this policy as they work on developing their critical mineral supply chains. Lastly, I offer recommendations for Japanese firms to improve their competitiveness as they look to move their supply chains away from China. These recommendations are:

1. The risk perception of Japanese firms towards Zimbabwe is still informed by the 2008 economic crisis. Concerted trade promotion efforts by JETRO, JICA in conjunction with the Zimbabwe Investment and Development Agency (ZIDA) and Zimbabwean trade officials is key in changing business's risk perception towards Zimbabwe.

2. JICA's long running collaboration with Zimbabwe's Department of the Surveyor General in topographical and geological exploration should be targeted on potential lithium zones across the country. This data would be key in guiding the exploration and development of lithium mines by Japanese firms.

3. For Japan to develop a critical mineral supply chain independent of China, it is important that it develops operations across the mining value chain from exploration to mining and refining. To reduce the cost of establishing mines and refinery facilities in Zimbabwe, Japanese firms can take advantage of the Special Economic Zones (SEZ) policy that has been utilised by Chinese mines operating in Zimbabwe. The Japan Organization for Metals and Energy Security (JOGMEC) has availed funding to support Japanese firms in shifting their production away from China to Japan and other third countries. This funding can be extended towards Japanese mining firms interested in developing activities in Zimbabwe.

4. As Japan and is EU partners work to develop their critical mineral supply chains in Africa, they must temper their views on Chinese investment and their own calls to decouple from China; lest they fall into the American trap of developing traditionally extractive mineral polices in the name of countering China, as seen by the Lobito Corridor refurbishment deal. Unlike Chinese investment, the American line does not include plans for refining minerals and manufacturing goods within Africa as per the objectives of the African Continental Free Trade Agreement (AfCFTA). Instead, firms should be open to utilising Belt and Road Initiative (BRI) infrastructure as they establish their own mining, refining and manufacturing entities.

Executive Summary

The African Continental Free Trade Agreement (AfCFTA) signed on 21 March 2018 represents Africa's industrialization ambitions.[1] To increase intra-African trade, governments are enacting value-addition policies that target their current raw mineral exports which collectively account for 70% of the continent's global exports.[2] By processing raw minerals, states seek to earn more from their exports and process finished products they can trade amongst themselves under AfCFTA.

Akinwumi Adesina the president of the African Development Bank (AfDB) bluntly stated that:

"The era of aid or free money is gone. African countries must now learn to develop via investment discipline. Countries can no longer rely on aid for growth or count it as part of government revenue, as has been the case for decades. Benevolence is not an asset class,"[3]

The dismantling of the United States Agency for International Development (USAID) – which spent US$12.7 billion in Africa in 2024 – by the Trump administration adds credence to Adesina's call for African leaders to move away from aid dependency and focus on strategic partnerships that can allow them to value-add the continents raw minerals and enhance intra-African trade.[4]

Africa's renewed industrialization drive has coincided with calls by Western European and Japanese governments to transition towards a Green Economy which substitutes fossil fuel technologies for less polluting alternatives such as electric cars and solar energy.

Consumer demand for these products has resulted in a rush for minerals necessary for manufacturing these green technologies such as: copper, cobalt lithium, nickel, manganese

[1] Odijie, Michael, "The need for industrial policy coordination in the African Continental Free Trade Area."

[2] African Development Bank. "Critical Minerals: Africa Seeks Transformation from Raw Export of Critical Minerals to Battery Manufacturing."

[3] African Development Bank. "The era of aid or free money is gone. Africa must overhaul its approach toward achieving fast-paced development."

[4] Dikau , Simon. "What are "critical minerals" and what is their significance for climate change action?"

and rare earth minerals.[5] Furthermore, these have been classified as 'critical minerals' by EU regulators and the Japanese government in recognition of their importance in manufacturing low emission technologies.[6]

It is important to note that the label 'critical minerals' is a politically motivated and is not so much influenced by the inherent chemical property of the mineral in question. Rather, it is the recognition that access to supplies of the mineral in question is crucial for the performance of a country's economic sector.[7] As a result, 'critical minerals' are context dependent, influenced by the political and economic demands of the country in question.

In the 1950s, iron was a critical mineral as the country was rebuilding from the World War II destruction. Japan developed a *Black Africa* and *White Africa* foreign policy to guarantee access to mineral resources whilst shielding the country from maintaining trade with racist regimes in Southern Africa. To advance trade objectives, Japanese corporations held significant influence over Japan's Africa policy working hand in glove with the diplomatic service. This enabled Kawasaki Steel to build an integrated iron and steel works plant for the Rhodesian Iron and Steel Company in return for exports of iron to Japan.

Under the principle of *Kanzai ittaishugi* (government and Big Business working in unison), the *zaikai* (business based organisations) were afforded access to government information and allowed to develop policies together with the bureaucrats and politicians from the governing Liberal Democratic Party (LDP).[8]

Presently, as countries compete for lithium, Japan has been unable to replicate its previous success in securing critical minerals, unlike China which currently dominates Zimbabwe's lithium industry. As Japan relegated its commercial focus in Africa in favour of increasing Official Development Assistance (ODA), China through the Forum on China-Africa Cooperation (FOCAC) increased trade flows into the continent.

[5] Nogimori, Minoru, "Restructuring of Critical Mineral Supply Chain Faces "Trilemma" -Economic risks to surge by pursuing de-risking from China and decarbonisation". *Japan Research Institute*, *7*(2), 2024.

[6] Nogimori, Minoru, "Restructuring of Critical Mineral Supply Chain".

[7] Dikau, "What are "critical minerals?"

[8] Jun Morikawa. "Japan and Africa: Big Business and Diplomacy."

Furthermore, China has risen to the demands of Zimbabwean policymakers to refine minerals in the country as part of the country's industrialisation objectives under AfCFTA. Chinese firms have taken advantage of Special Economic Zones (SEZs) policies to establish mineral refining facilities in Zimbabwe. Additionally, Chinese refinery infrastructure is being integrated into regional and international trade routes to take advantage of AfCFTA and export finished products to China.

Author's Note

The relationship between Japan and the African continent is one that is often understated by citizens and policymakers on both sides. In my engagements with policymakers on both sides, commentary on Japan's Official Development Aid (ODA) to Africa is consistently mentioned as the bridge between the two parties although in some countries such as South Africa, recognition is given to the historical and contemporary trade ties between the two states. As an African Studies scholar, I have made it my focus to explore Japan's ties with African states, continuing in the path of my master's thesis '*Forged in Steel: The Origins of Japan – Rhodesia Trade and Diplomatic Relations (1924-1980)*'.

In January 2025, I was offered an opportunity by the LeidenAsiaCentre and the Isaac Alfred Ailion Foundation (IAAF) to continue my research on economic ties between Japan and Africa. In my research, I focus on how the industrialised countries like China and Japan are responding to critical mineral policies developed by less industrialised lithium producing states like Zimbabwe.

I undertook this research without a background in Japan or Asian Studies instead, I relied on my African Studies background and fieldwork in Zimbabwe and South Africa done in April 2025. I conducted interviews with personnel from the Japan External Trade Organisation (JETRO) offices in Amsterdam and Johannesburg. In addition, I interviewed a former member of Japan's diplomatic mission to Mozambique. I also consulted industry experts and academics to bridge my knowledge gap on Japan.

I would like to thank the team at the LAC and IAAF particularly Florian Schneider, Floris Harm and Anoma van der Veere for guiding me throughout my research.

I would also like to state that I have no conflicts of interests.

1. Big Business in Japan's Africa Policy Decision-Making Structure

In the 1960s Japanese multinational corporations had unyielding influence over Japan's foreign policy towards Africa.[9] Then, Japan had a dual *Black Africa* and *White Africa* policy which sought to guarantee Japan's raw material supply from the white minority regimes in Southern Africa including Rhodesia (Zimbabwe) and South Africa newly independent Africa states whilst maintaining diplomatic support from the newly independent black African states such as Kenya, Tanzania and Senegal.[10] Under the principle of *Kanzai ittaishugi* (government and Big Business working in unison), the *zaikai* (business based organisations) were afforded access to government information and allowed to develop policies together with the bureaucrats and politicians from the governing Liberal Democratic Party (LDP).[11]

The *Keidanren* (Japan Federation of Economic Organisations) was formed in August 1946 with the mission of driving Japan's reconstruction and economic recovery. The *Keidanren* acts a lobby group driving pro-business policies amongst Japan's lawmakers. In August 1970, the Keidanren Committee on Cooperation with Africa (KCCA) was formed to "promote the trade and economic relations with Africa on a private basis".[12] KCCA officials participated in formulating government policy through official networks and private channels such as donations to the LDP and provision of *'amuraki'* (lucrative post-retirement positions for bureaucrats).[13] Through these actions, the Japanese government provided diplomatic support for its businesses which came under scrutiny for trading with rogue regimes such as apartheid South Africa.

The KCCA also drew membership from governmental organisations such as the Japan Export – Import Bank and the Japan International Co-operation Agency (JICA). Additional business member organisations with a focus on Japan – Africa affairs were the Africa Society of Japan

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[9] For a full account of Japanese business dominance in Japan's Africa diplomacy, see Japan and Africa: Big Business and Diplomacy, Jun Morikawa, 1997

[10] Madamombe, Panashe, "Forged in Steel: The Origins of Japan – Rhodesia Trade and Diplomatic Relations (1924-1980.", pg. 84.

[11] Morikawa, Jun. "Japan and Africa: Big Business and Diplomacy."

[12] Morikawa, pg. 106

[13] Madamombe, pg. 90.

(ASJ), Southern African Traders Association (SATA) and the Nippon Club of South Africa (NCSA) [See Table 1 below].[14]

Key Corporations Involved in Japan's African Diplomacy

	KCCA 1986	KCCA *Policy Committee* 1985	KCCA *Special Committee* 1985	*ASJ 1986*	*SATA*	*NCSA*
C. Itoh & Co. Ltd	*	*	*	*	*	*
Hitachi Ltd	*			*		*
Marubeni Corp.	*	*	*	*	*	*
Matsushita Electric	*			*	*	
Mitsubishi Corp.	*	*	*	*	*	*
Mitsubishi Heavy Industries	*	*	*	*		
Mitsui & Co. Ltd	*	*	*	*	*	*
Mitsui OSK Lines Ltd	*	*		*	*	
NEC Corp.	*	*	*	*		
Nippon Koei Co. Ltd	*			*		
Nissan Motor Co. Ltd	*			*	*	*
Nissho Iwai Corp	*		*	*	*	*
Sumitomo Corp	*		*	*	*	*
Toyota Motor Corp.	*			*	*	

Table 1: KCCA- Keidanren Committee on Co-operation with Africa; Africa Society of Japan (ASJ); Southern African Traders Association (SATA); Nippon Club of South Africa (NCSA). Source: Jun Morikawa Japan and Africa Big Business and Diplomacy, pg. 112.

1.1 Japan – Rhodesia: A Reciprocal Critical Minerals Trade

[14] ibid. pg. 112.

In the 1950s, as Japan grappled with the challenge of post-war reconstruction after the devastation of the Second World War, iron became a critical mineral for rebuilding infrastructure and feeding Japan's factories.[15] Japan faced two challenges: an under-capitalised manufacturing industry and poor domestic natural resource base.

To tackle these two challenges, Yataro Nishiyama, the president of Kawasaki Steel relied on the principle of *kanzai ittashugi (government and big business working in unison)*.[16] The stakeholders in this relationship comprised government diplomats, business member organisations and corporates.

To recapitalise Japanese iron and steel manufacturers, Nishiyama directly lobbied the World Bank to extend loans to Kawasaki Steel and other Japanese iron and steel manufacturers.[17] World Bank funds were transferred to the Japan Development Bank which forward lent money to Japanese manufacturers. Thanks to Nishiyama's lobbying, a total of US$161.4 million from the World Bank was extended to firms that included: Yawata Iron and Steel Co, Nippon Steel Tube, Kawasaki Steel, Kobe Steel, Sumitomo Metal Industries and Fuji Iron & Steel.[18]

With Japanese iron and steel manufacturers sufficiently capitalised, Nishiyama worked on securing overseas supplies of iron for Kawasaki Steel's domestic manufacturing facilities and turned to Rhodesia to fulfil this demand.

In the 1955, Rhodesia was in the process of expanding the Rhodesian Iron and Steel Company (RISCO) and initially sought funding from Anglo American Corporation (a South African mining entity) and Lancashire Steel (a British iron and steel company). The national identities of these two firms was important as Rhodesia was then a British colony and mostly relied on British and South African entities for its capital requirements although none of these entities then had enough capital to spare for RISCO's expansion efforts.

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[15] Itami, H., 高度成長を引きずり出した男 サラリーマン社長・西山彌太郎の夢と決断 *(The Man Who Dragged Out High Growth: The Dreams and Decisions of Salaryman President Yataro Nishiyama)*. PHP, 2015

[16] Madamombe, pg. 130

[17] Itami, "The Man Who Dragged Out High Growth".

[18] Madamombe, "Forged in Steel", pg. 76.

Kawasaki took advantage of this capital deficit and funded a blast furnace and integrated iron and steel works for RISCO. In lieu of cash, RISCO was to ship, 360 000 tons of pig iron and 600 000 tons of iron ore to Kawasaki per annum from 1963 until a total of 50 million tonnes had been shipped. With the integrated iron and steel works, Rhodesia could manufacture and export sophisticated iron and steel exports, thereby increasing the country's foreign currency receipts.

The magnitude of the RISCO-Kawasaki deal was best encapsulated by British reactions to the deal during a 1962 exchange in the House of Commons.

Member for Mid-Bedfordshire (Mr. Stephen Hastings)

> "I was much encouraged to read of the latest negotiations for a new £41⁄2 million steel plant at Bukwe between the Rhodesian Iron and Steel Corporation and Kawasaki, a Japanese consortium. Incidentally, the House may be interested to know that trade between Japan and Southern Rhodesia has increased from something like £153,000 in 1954 to £7 million today. Therefore, it is plain the Japanese do not take the gloomy view which, unhappily, some of our own industrialists seem to of the prospects there."[19]

Furthermore, Mr Hastings quipped that:

> "It is, perhaps, an unfortunate commentary that the Japanese should be showing us the way in a country which we created. I wonder what Cecil Rhodes would say if he were alive today and could reflect on the rather timorous attitude of some of our own industrialists?"[20]

This commercial transaction is an example of how Japanese businesses used the principle of *kanzai ittashugi (government and big business working in unison)* to simultaneously secure critical minerals for Japan whilst ensuring that local (African) states could value-add their minerals domestically.

1.2 From Big Business to Aid: Japan's 21st Century Africa Policy

[19] ibid., pg. 104.

[20] Madamombe, "Forged in Steel", pg. 105.

Towards the turn of the century, the relationship between Big Business and the Government switched as the bureaucracy retook the lead, directing Japan's relationship with Africa.[21] As more African states became independent, Japan had to grapple with the historical injustices of its *Black Africa* and *White Africa* policy which had seen the country fail to provide material and support to the liberation movements during their struggle eras. The Tokyo International Conference on African Development (TICAD) was inaugurated in 1993 by Japan's Ministry of Foreign Affairs to create a platform between Japan and individual African states.[22]

Within Japan's bureaucracy, responsibility for Africa's affairs gravitated from the Ministry of International Trade and Investment (MITI) and the keidenren, to the Ministry of Foreign Affairs (MoFA). This move meant that the lobbying ability that had previously been accorded to big business was curtailed as the MoFA focused on mending relationships with newly independent African states.

Under the Ministry of Foreign Affairs, Official Development Aid (ODA) became the primary focus of Japan's Africa policy. ODA flows from Japan outstripped investment flows into Africa and Japan became the largest ODA contributors to the continent in the 1990s.[23] Into the 21st century, Japan has continued to prioritise aid disbursements over investment flows, with aid flows averaging US$1.5-1.7 billion per year since 2012.[24]

The TICAD format pioneered by Japan has since been replicated by countries such as China, Russia, South Korea, the United Kingdom and most recently, the United States.[25] At these recurring summits, African heads of states are invited by the heads of states of the respective states to discuss matters ranging from security, aid and investing. At TICAD, Japan invites developmental partners such as: the African Union, African Development Bank (AfDB) and the United Nations Developmental Program (UNDP).

[21] Morikawa, "Japan and Africa".

[22] Ministry of Foreign Affairs of Japan. "Announcement of the logo of the 9th Tokyo International Conference on African Development (TICAD 9) and usage of the logo."

[23] Keiichi, Shirato, "*Japan's Strategic Interests in the Global South: Africa*", April 21, 2024.

[24] ibid.

[25] Soulé, Folashadé, "*How Popular Are Africa+1 Summits Among the Continent's Leaders?", December* 1, 2021.

The Japan External Trade Organisation (JETRO) is a semi-governmental organisation whose mandate is to promote trade and investment between Japan and the world.[26] At its inception in 1958, JETRO was tasked with promoting Japan's exports by establishing offices outside of Japan to help Japanese firms with market research and penetrating new markets, including in Africa.[27]

However, in an interview with Mr Hiroshi Matsuura, Deputy Director JETRO Amsterdam, he mentioned a considerable shift in JETRO's 21st century mandate.

> "In the 80s [1980], we used to focus more on getting Japanese businesses to go outside Japan but now we are mainly focusing on drawing foreign entities into Japan… the change was because in the 1990s we had a trade surplus and this caused a lot of tension with our allies like [the] United States".[28]

This reorientation of JETRO leaves Japanese corporates operating in Africa with reduced market support although there remain 9 offices throughout the continent.[29]

1.3 China – Japan Decoupling and the Lithium Industry

Japan has joined the EU and USA in implementing policies meant to restructure critical mineral supply chains and reduce interdependence on China. Due to increased geopolitical tensions, these countries fear that China will weaponise its dominance as some of these minerals can be used for high-tech equipment like semi-conductors which have consumer and military applications.[30]

To reduce reliance on China, the Japanese government has enacted policies aimed at 'onshoring' and diverting production to third countries.[31] In 2020, the Ministry of Economy, Trade and Industry (METI), availed 57.4 billion yen ($536 million) in subsidies to invest in

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[26] JETRO, "About Us".

[27] ibid.

[28] Interview with JETRO representative, JETRO Amsterdam. Hiroshi Matsuura Deputy Director JETRO Amsterdam.

[29] JETRO, "*Africa Worldwide*".

[30] Nogimori, M, "Restructuring of Critical Mineral Supply Chain Faces".

[31] ibid.

production within Japan.[32] Furthermore, 30 firms were given funding to relocate their China operations to Southeast Asian countries amongst them Vietnam, Myanmar and Thailand.[33] In addition to these policies, budgetary support of 215.8 billion yen (~US$I.5 billion) has been extended to the Japan Organization for Metals and Energy Security (JOGMEC) and subsidy programs related to mineral resources under the Economic Security Promotion Act.[34]

Within this context of Japanese and European 'decoupling' from China's supply chain dominance, Zimbabwean legislators are enacting mandatory lithium refining rules for miners to gain as much value as possible from the rise in competition for lithium.

Zimbabwe's ambitions are best captured by the African Development Bank Group Vice President for Private Sector, Infrastructure, and Industrialization, Solomon Quaynor who stated that, "Africa is not going to adopt the old industrialization approach when it comes to the Green minerals...We want to move up that value chain."[35]

1.4 Japan – Zimbabwe Lithium Trade

At the 2025 Zimbabwe International Trade Fair (ZITF), Japan's ambassador to Zimbabwe Ambassador Shinichi Yamanaka made a presentation on current Japan – Zimbabwe business ties.

According to the ambassador:

> "Trade between Japan and Zimbabwe is only one-eighth of pre-2008 levels", and despite these low figures business activities are "expanding gradually and steadily".[36]

The growing Japan – Zimbabwe trade includes exports of petalite (unprocessed lithium) from Zimbabwe to Japan. In 2022, the lithium trade between Japan and Zimbabwe fell victim to

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[32] Bloomberg, "*Japan Will Pay Its Companies to Leave China*", July 8, 2020.

[33] ibid.

[34] Kim, Gyu-pan. "Japan's Supply Chain Policy and its Implications for South Korea", 2024.

[35] African Development Bank, "*Critical Minerals: Africa Seeks Transformation from Raw Export of Critical Minerals to Battery Manufacturing*", December 5, 2024.

[36] newZWire, "*Japanese ambassador to Zimbabwe, Shinichi Yamanaka, speaks on trade between the two countries at ZITF*". In 2008, Zimbabwe underwent a hyperinflation period which resulted in a debilitating economic crisis and losses for investors.

two policies: China's investment drive in Zimbabwe's lithium industry and the domestic lithium refining policy introduced by Zimbabwe's ministry of mines, to take advantage of high lithium prices and increase earnings from exports. A lithium mining company that previously exported to Japan was acquired by a Chinese firm which terminated exports to Japan.

Secondly, the government of Zimbabwe released Statutory Instrument 213 of 2022 which banned the export of any lithium bearing rock or ore that had not undergone any refining in Zimbabwe.[37] This law was motivated by the desire to cash in on the high price of lithium on global metals markets.

Zimbabwe's unprocessed lithium ban impacted the manufacturing of 'Banko-yaki' traditional Japanese earthenware pots manufactured in the Mie Prefecture. Ambassador Yamanaka engaged in "earthenware pots diplomacy" with Zimbabwean officials to express how critical lithium supplies were for Mie Prefectures earthenware products. Japanese lobbying was successful as two years later in April 2024, lithium exports from Japan to Zimbabwe were resumed.[38] Later in the year, the ambassador met with the governor of Mie Prefecture and assured them that the embassy would continue lobbying Zimbabwean officials to ensure that lithium supplies would remain uninterrupted.[39]

[37] Veritas, "*SI 2022-213 Base Minerals Export Control (Lithium Bearing Ores and Unbeneficiated Lithium) Order*", 2022.

[38] Ministry of Foreign Affairs of Japan, "*Mie Prefecture and Zimbabwe connected by the winter essential "Earthenware Pots.*", 2025.

[39] ibid.

Figure 1: Ambassador Yamanaka holding up earthenware pot together with an official from Mie Prefecture. Photo Embassy of Japan in Zimbabwe. (Facebook).

Despite the success of the ambassadors "earthenware pots diplomacy", the local value-addition policies undertaken by Zimbabwean policymakers could see Mie Prefecture's access to Zimbabwe's unprocessed lithium under threat once again. Japan's success lay in part to provisions in Zimbabwe's law banning unprocessed lithium exports, which gave exceptions to the ban on the basis that:

> "a miner or exporter of lithium upon production of written proof satisfactory to the Minister that there are exceptional circumstances justifying the exportation in question".[40]

Japan's turn to diplomatic lobbying to guarantee access to critical minerals is a marked turn from the 1960s when its multinationals pioneered reciprocal investment deals such as the RISCO-Kawasaki arrangement.

Surprisingly, Japan retains an important role in Zimbabwe's mining sector. Through the Japan International Cooperation Agency (JICA), Japan works with the Department of the Surveyor General (DSG) Zimbabwe, a governmental body charged with undertaking topographical and geological surveys of the country's terrain.[41]

[40] Veritas, "*SI 2022-213 Base Minerals Export Control (Lithium Bearing Ores and Unbeneficiated Lithium) Order*".

[41] Ministry of Lands, Agriculture, Fisheries, Water and Rural Development. "*Surveyor General*", May 3, 2024.

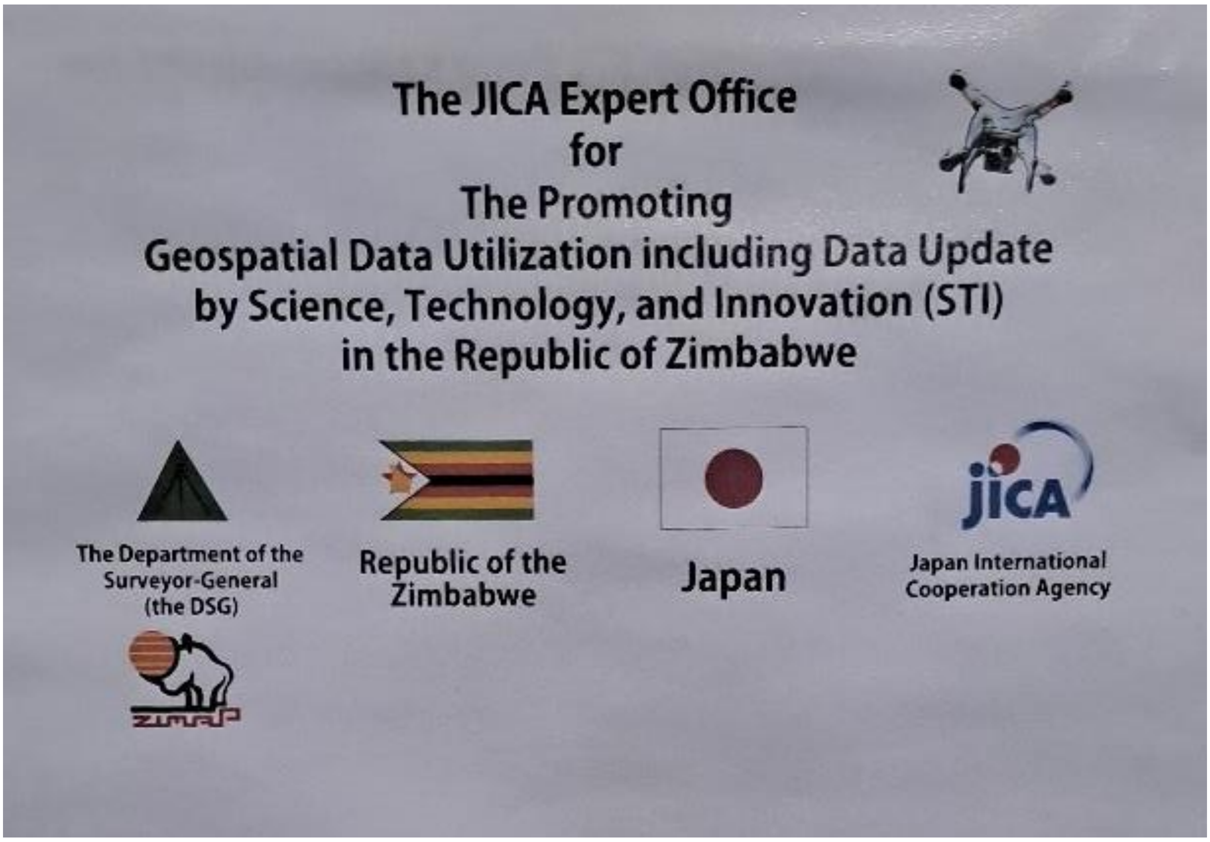

Figure 2: Project Notice for joint JICA - DSG Geospatial mapping project in Zimbabwe. Image by author.

Since the 1980s, there have been ongoing partnerships between the two agencies with JICA dispatching experts to undertake geological and geochemical surveys across Zimbabwe; helping identify and quantify the country's mineral resource.[42] Additionally, JICA's *Kizuna* Graduate Course Program arranges professional academic exchange programs for Zimbabweans.

In 2020, Mr Brian Muteta the Deputy Director, Non-Energy Minerals, within the Ministry of Mines and Mining Development was nominated to undertake a JICA Knowledge Co-Creation Program on Remote Sensing and Exploration of minerals.[43] His insights were dedicated towards the country's chrome resources. In the previous year, Mr Muteta had also undertaken professional internship at Mitsubishi Techno Corporation.[44]

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[42] JICA, "*Report on The Cooperative Mineral Exploration in The Kadoma Area Republic of Zimbabwe Phase II*"1988.

[43] JICA, "*Experience of Ex-Knowledge Co-Creation Program (KCCP) Participant Brian Muteta*", 2021.

[44] Ibid.

Despite the long running collaboration between JICA and the Surveyor General, the relationship has not translated into large scale mining by Japanese entities in Zimbabwe; a fact which can be attributed to investor's perception of Zimbabwe as a high-risk environment.

As Japanese institutions like JICA, JETRO and Japan Organisation for Minerals and Energy Security (JOGMEC) and corporations work to establish independent critical mineral supply chains, it is important that they rethink their risk perception towards lithium producing countries like Zimbabwe. In the words of Zimbabwe operating, South African platinum mining company CEO, Nico Muller:

> "Personally, I am quite happy that the jurisdiction [Zimbabwe] is seen as a risk by most other competitors because it allows us to continue expanding our interests in the jurisdiction"[45].

[45] Ryan, B, "*Perception of Zimbabwe risk is a secret blessing for Implats, says CEO*", April 7, 2022.

2. China in Africa: An Adaptable Partner

Unlike Japan, China's foreign policy towards Africa has been government led. During the 20th century, China's political and government officials focused their efforts on political solidarity and forged relations with the new independent African states whilst supporting political groups agitating for independence like the Zimbabwe African National Union (ZANU) in Zimbabwe.[46] Whilst Japan prioritised economic ties with Africa, China deepened its political links with the continent.

At the turn of the 21st century, Chinese government officials held the first Forum on China – Africa Cooperation (FOCAC) in October 2000, the summit is a recurring platform between the China's government and African government officials to discuss trade matters.[47] Unlike Japan, it is China's bureaucracy that has paved the way for the rapid expansion of Chinese firms into Africa and continues to co-opt firms into its overseas developmental projects such as the Belt and Road Initiative (BRI).[48]

Chinese investment in Africa's ports, railways and roads allows Chinese owned entities to extract mineral from the continent and transport them to China where they are refined and fed into China's factories.[49]

Under former president Robert Mugabe, Zimbabwe adopted its 'Look East Policy' in 2003, which strengthened economic and political ties between Zimbabwe and Asian states, particularly China.[50] This policy was in response to the imposition of economic and political sanctions by the EU, United Kingdom and United States on Zimbabwean political actors.[51]

[46] Nyabiage, Jevans, "*How China is sharing its development and governance experience with Africa'*, September 18, 2024.

[47] Focus on China - Africa Cooperation. "*The 2024 Summit of the Forum on China-Africa Cooperation*", September 4, 2024.

[48] Lisinge, Robert. Tama. "The Belt and Road Initiative and Africa's regional infrastructure development: implications and lessons."

[49] ibid.

[50] Ojakorotu, Victor and Kamidza, Rumbidzai. "Look East Policy: The Case of Zimbabwe–China Political and Economic Relations Since 2000."

[51] ibid.

This sanctions constrained the ability of the access bilateral and multilateral financing, prompting the country to deepen its economic ties with China and Asia.

Current President Emmerson Mnangagwa has a 'Zimbabwe is Open for Business' policy targeted at local and international investors including the states that had implanted sanctions against Zimbabwean officials and government entities.[52]

Despite the government's efforts to diversify its investor base, Chinese companies continue to dominate investment flows into Zimbabwe, primarily targeting the country's mining sector. In 2023, the Zimbabwe Investment Development Agency (ZIDA) – the country's investment promotion office – reported that 369 investors from China had registered projects with a cumulative project investment value of US$3,9 billion. In contrast, 15 United Kingdom based entities registered projects worth US$26.7 million and only one Japanese entity registered a project with an investment value of only US$300 000.

2.1 China's Response to Zimbabwe's Lithium Policy

In 2022, the market for lithium carbonate, a key mineral in Lithium-ion batteries used to make battery packs for most electric vehicles shot up from US$4 000 to US$86,000 per tonne in November 2022 before crashing to about US$9 000 per tonne in 2023 as more deposits were discovered and brought to production. Despite the price drop, the global market for lithium is projected to reach grow at a CAGR of 15.7% from 2022 and reach US$22.6 billion by 2030.[53] Zimbabwe's rank within the top ten global lithium deposits has drew in interest from both Chinese and Western miners making it the world's largest hard rock lithium (petalite) producer.[54]

The lithium rush into Zimbabwe by Western and Chinese firms was met by local demands to 'value add' the country's lithium exports instead of the wholesale exportation of unprocessed lithium. Zimbabwe intends to derive greater revenues from the exports of finished products and increase employment within the processing of these goods. For Zimbabwe and other

[52] Government of Zimbabwe. "*Zimbabwe is Open for Business*."

[53] neWZWire. "*Zimbabwe Lithium Brief Q2023*", 2023.

[54] Natural Resources Canada, "*Lithium facts - Natural Resources Canada*".

African states endowed with critical minerals that their ambitions are to go up the lithium value chain to manufacture electric vehicle batteries and ultimately, develop domestic electrical vehicle manufacturing industry.

Despite these ambitions, policymakers have tempered their expectations towards the new lithium players and have enacted incremental policies that will eventually see lithium processed into high value commodities. In 2022, the country banned exports of raw lithium and mandated all mining houses to establish processing plants. Since then Chinese firms built plants that have process raw lithium into lithium concentrates, an intermediate product that is exported to China where it is then refined into battery grade lithium carbonate.[55]

[55] newZWire. (2025, May 21). "*What's raw, what's not: How two conflicting Zimbabwe lithium laws are pitting miners against the Govt*", May 21, 2025.

Key Lithium Projects in Zimbabwe

Name	Status	Remark
Huayou Cobalt (China)		Bought Arcadia Mine in 2022 for US$378 million from Prospect Resources (Australia). It is investing US$300M in mine development and a processing plant. Plant construction was completed April 2023. Arcadia has capacity to produce 400,000 tonnes of concentrate per year.
Sinomine (China)		Acquired Bikita Minerals for US$180M in 2022. The company is investing US$200M in mine development and two plants (spodumene/petalite). Capacity is 480,000 tonnes of petalite and 250,000 tonnes of spodumene concentrate per year.
Chengxin (China)		Bought 51% of MaxMind, holder of Sabi Star Mine. The company's US$130 million plant has a capacity of 300,000 tonnes of lithium concentrate per annum.
Premier African Minerals:		Completed construction of Zulu Lithium pilot plant in April 2023 under offtake agreement with Canmax (formerly Suzhou TA&A). Zulu is to produce 48,000 tonnes per year, before a planned ramp-up.
TN Gold		Zimbabwean owned Lithium mining company
Sandawana Mine		Lithium project owned by Kuvimba Mining House which serves as Zimbabwe's sovereign wealth fund.
Red Rock Resources (UK):		Acquired lithium claims in Zimbabwe in 2022, and established a lithium exploration unit in the country, African Lithium Resources.
Prospect Resources (Aus):		After selling its stake in Arcadia Mine to Huayou, Prospect is exploring a new claim, Step Aside, 8KM from Arcadia Mine.
Galileo Resources (UK):		Spending US$1.5 million to explore for lithium and gold at claims held by BC Ventures near Kamativi.
Arkle Resources (Irelend):		Granted three licences covering 163 hectares in Insiza district.
Marula Mining (UK):		Entered Zimbabwean market in 2023 after identifying opportunities in copper and lithium.
Li3 Lithium (Canada):		In a 50-50 JV with Premier African Minerals in the Mutare Lithium Project, which has 1500ha of licences near Sabi Mine.
CAT Strategic Metals Corp. (Canada)		CAT is partnering with Zimbabwe Lithium Company in developing the Kamativi tailings facility left by the old tin mine. A current dispute with China's Beijing Pingchang delayed project development.
China National Resources (China)		NASDAQ-listed exploration company exploring in Manicaland through Williams Minerals, owned by Top Pacific Ltd and Feishang Group, also shareholders of China National Resources.
Mirrorplex (Australia)		Project under exploration

Table 1: List of active lithium mining entities in Zimbabwe and projects under current exploration. Information from: newZWire Zimbabwe Lithium Brief Q 2 2 0 2 3 and *ZELA. (2023, September 20).* Chinese dominance in Zimbabwe's lithium mines: Potential risks, vulnerabilities and opportunities in the critical minerals sector.

Key

	Active Mining Project
	Exploration or developmental stage

The table shows that Zimbabwean authorities have opened investment in the lithium sector to investors from a range of countries. There is a distinction between active projects and projects under exploration, with Chinese entities dominating the former whilst Australian, British and Canadian entities are well represented in exploration.

Interestingly, whilst American, European and Japanese government officials together with their allies talk about 'de-coupling' from Chinese supply chains for critical minerals; Zimbabwe shows growing co-operation between Chinese and Australian entities in the lithium sector.[56] In the case of Huayou Cobalt, Australian owned Prospect Resources undertook exploration to determine the size of the lithium resource before selling an 87% stake in the mine to Huayou Cobalt for US$378 million.[57]

Unlike Australian and European entities, Chinese entities tend to invest in long-term active mining as China's lead in refining and manufacturing lithium batteries and renewable technologies offers a ready offtake market for miners globally. Research by the Brookings Institute indicates that China's global refinery capacity sits at "refines 68% of nickel globally, 40% of copper, 59% of lithium, and 73% of cobalt."[58] Further up the manufacturing value chain, the country 78% of global battery cell manufacturing capacity is held by China and three fourths of the world's lithium-ion battery mega factories are in China.[59]

In an interview, American Ambassador to Zimbabwe Pamela Tremont remarked that the vertically integrate nature of Chinese companies allowed them to mine lithium at a loss even after the collapse of market prices; resulting in a preference by American, Australian and Canadian firms to sell their lithium claims to Chinese multinationals.[60]

[56] Bloomberg, "*Japan Will Pay Its Companies to Leave China*", July 8, 2020.

[57] Prospect Resources, "*Arcadia Case Study - Prospect Resources*". After selling its Arcadia lithium mine to Chinese investors, the company has acquired additional rights to prospect for lithium at the Step Aside mining claim, 8km away from the Arcadia mine.

[58] Castillo, R., and Purdy, C. "China's Role in Supplying Critical Minerals for the Global Energy Transition What Could the Future Hold?"

[59] ibid.

[60] Friday Drinks_Zfn Capital. "*US Ambassador on Zim Relations, Sanctions, Aid, Trade & Investment_Pamela Tremont*", June 20, 2025.

Local critics have expressed displeasure at the flouting of labour and environmental laws by Chinese mines.[61] At some mines workers have been assaulted and anti-pollution laws flouted raising calls for the government to rein in errant operators and a general negative sentiment against Chinese investment.[62] Criticism has been levelled against the Zimbabwean government for failing to rein in errant miners although the government has deported Chinese miners on occasion.[63]

2.2 Growth through Special Economic Zones (SEZs)

In 1979, China established four SEZs with preferential liberal economic policies targeted at drawing in Foreign Direct Investment which spurred the manufacturing and technology industry.[64] Shenzhen which was the first SEZ transformed from a fishing village in 1980 to a tech focused metropole with a US$510 billion GDP in 2025, signalling the success of China's SEZ revolution.[65]

Since the beginning of the millennium, China has been emulating this SEZ success in the rest of the world with the government announcing in 2006 that it would establish 50 overseas "economic trade and economic cooperation" with six of these established in Africa.[66] This strategy was developed by then Chinese President Hu Jintao whose "going out" (zou chuqu) strategy aimed at offshoring mature Chinese industries as a way of countering friction towards Chinese goods in European and American markets.[67]

The Zimbabwean Ministry of Mines has taken a leaf from the Chinese economic playbook and developed SEZ laws to encourage investment in the lithium sector. The Zimbabwe Investment Development Agency (ZIDA), is a semi-government agency whose focus includes assisting

[61] Nyathi, Kitsepile, "*Zimbabwe deports Chinese in viral video assaulting mine workers*", July 19, 2024.

[62] ibid.

[63] Matiase , Farai, "*Zimbabwe: In a rare move, Chinese nationals deported over alleged abuse*", 2024.

64 Brautigam, D., Farole, T., & Xiaoyang, T. "China's Investment in African Special Economic Zones: Prospects, Challenges, and Opportunities."

65 Weiwei, G. "Shenzhen hits national firsts in 2024, targets 5.5% GDP growth in 2025"

66 Brautigam, D., Farole, T., & Xiaoyang, T. "China's Investment in African Special Economic Zones." These SEZs were constructed in Zambia, Mauritius, Egypt, Ethiopia, Nigeria and Algeria.

67 ibid.

investors establish Special Economic Zones in the country.[68] The SEZ policy accords the following benefits to investors:

- Zero-rated Corporate Income Tax for the first 5 years of operation with a corporate tax rate of 15% applying thereafter
- 100% rebate on customs duty for all imported equipment, machinery and raw materials Special Initial allowance of 50% of cost from year one and 25% in the subsequent two years
- Specialised expatriate staff will be taxed at a flat rate of 15%

Prospect Resources applied for National Project status to take advantage of the benefits offered by the government. National Project Status gave Prospect a 5-year duty-free window to import eligible equipment.

The market access afforded by AfCFTA has seen Chinese firms locate their industrial plants across African SEZs and in the absence of existing SEZs, lobby for the granting of SEZ status for their operations. In Zimbabwe, Chinese mining firms have taken advantage of SEZs to cluster their processing activities and take advantage of export incentives to get preferential market access under the AfCFTA.[69]

2.3 Welcoming Quality Products from Africa to the Chinese Market

On the 12th of June 2025, Chinese President Xi Jinping announced that China would be extending zero-tariff measures to 53 out of 54 African except for Eswatini which diplomatically recognises Taiwan.[70] This was in fulfilment of a promise made by China's foreign minister at the 2024 FOCAC summit where he declared that "China is ready to... welcome quality products from Africa to the Chinese market".[71]

The expansion of duty free access is in recognition of the growing China – Africa trade which has been skewed in favour of China which had a US$62 billion surplus with the continent last

[68] Zimbabwe Investment and Development Agency, "2023 Annual Report Sustainable Growth".

[69] Zimbabwe Investment and Development Agency, pg. 24

[70] Nyabiage, Jevans. "*China to remove tariffs on nearly all goods from Africa as both criticise US trade moves*"

[71] Miriri, Duncan. "China says it will remove all tariffs on African exports to boost trade."

year.[72] To narrow this deficit China will be investing US$50 billion on the continent over three years. Additionally, China has realised the combination of AfCFTA and its open market policy will skew benefits in favour of Middle income African states at the detriment of their Least Development Countries (LDC) counterparts. LDCs like Tanzania or Mali will struggle to compete against more developed states like South Africa. To bridge this gap, China is availing additional training and marketing support to African LDCs.[73]

2.4 Palm River Energy Metallurgical Special Economic Zone (PREMSEZ)

The Palm River Energy Metallurgical Special Economic Zone (PREMSEZ) undergoing construction in the South of Zimbabwe is a prime example of a Chinese SEZ that is designed to create economic linkages within AfCFTA whilst guaranteeing Chinese access to critical metals.

PREMSEZ is an industrial zone under development by the Government of Zimbabwe, Xintai Resources of China and local Zimbabwean firm Tuli Coal. The project is developing a metallurgical processing hub for steel, ferrochrome and other minerals complete with a 1 200MW power station to power the SEZ and feed excess energy onto the grid.[74] The industrial hub is in the town of Beit Bridge bordering South Africa, along the critical North–South corridor linking the Democratic Republic of Congo, Zambia, Zimbabwe and South Africa.[75]

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[72] ibid.

[73] ibid.

[74] The Herald. "The land where elephants used to roam: Palm River Energy Metallurgical Special Economic Zone."

[75] Mutizwa, G. "Chronicle of a Beitbridge border crossing."

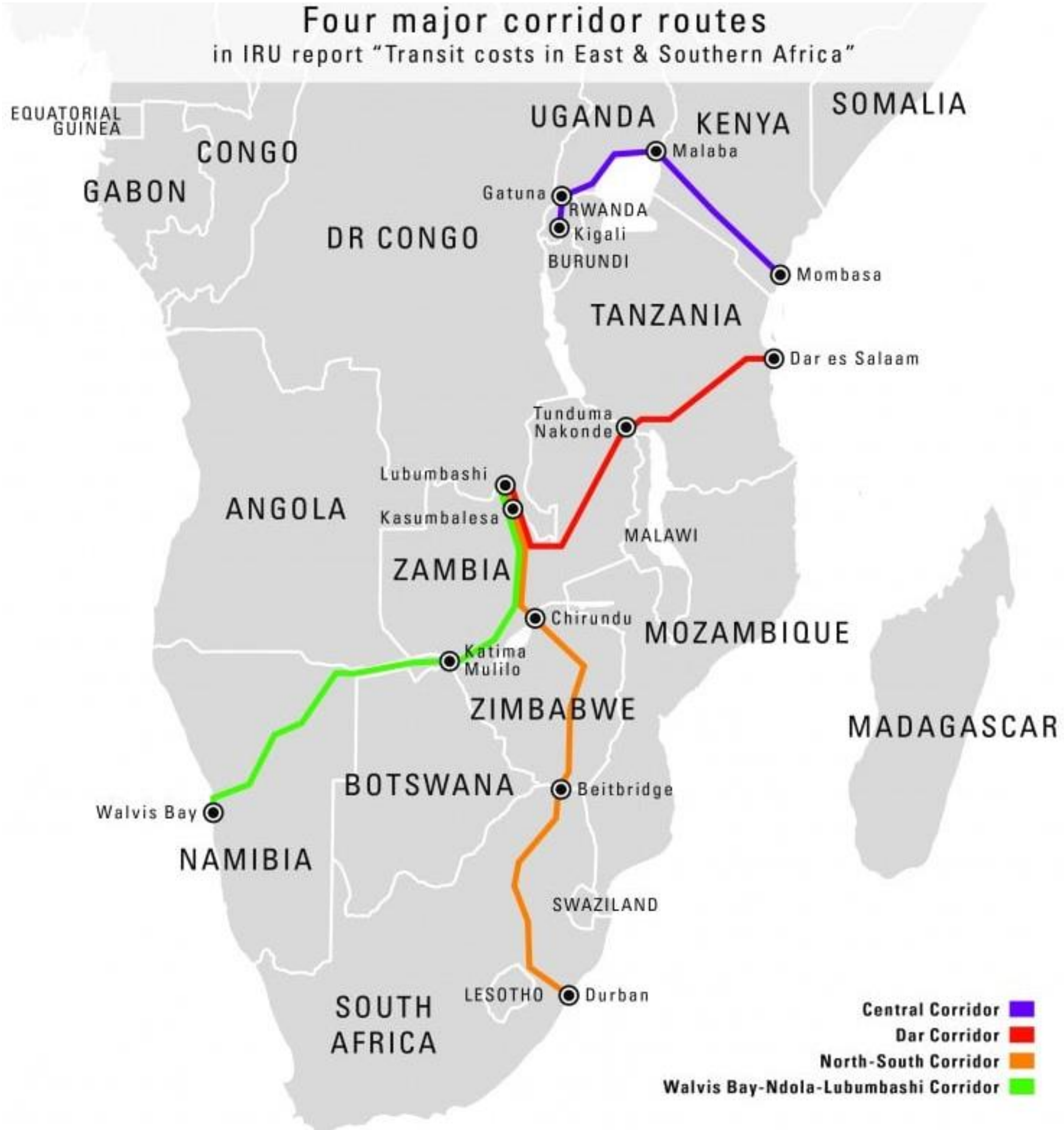

Figure 3: North South Corridor with the town of Beitbridge which has been developed into a Special Economic Zone outlined on the map. Image from: International Road Transport Union. (2025, April 15). New IRU study shows how TIR can radically reduce trade costs in Africa.

The project illustrates the evolving nature of Chinese investment in Africa's extractive industry as it combines China's goals of securing overseas supplies of raw materials whilst developing domestic capacity in its host nations. The clustering of Chinese owned mines and commercial entities in and around the SEZ allows investors to draw necessary resources for creating the heavy industry that Zimbabwe and other African nations aim to deliver.

The North-South rail link enables the SEZ to draw inputs from other mineral rich Southern African nations like the D.R.C and connection to industrialised South Africa, will allow for manufacturing of more sophisticated products within the continent, achieving the economic interlinkages that AfCFTA aims to develop. South Africa's ports will then enable manufactured goods from the SEZs to be exported to China without any tariff barriers.

As, China builds up mines, refinery infrastructure and factories along the North-South corridor and Dar Corridor (Zambia to Tanzania), America is countering this investment through a US$533 million loan to refurbish the Lobito Corridor.[76] The Lobito-Corridor a railway line which runs from the DRC to Angola. In May 2025, the United States backed a DRC-Rwanda peace deal that will see America act as a security guarantor for the Congo in exchange for access to critical minerals from the DRC.[77] The U.S intends to transport mineral from the D.R.C along the Lobito Corridor to America where

The American plan to counter Chinese investment by refurbishing the Lobito Corridor to simply ship raw minerals from the DRC to the Atlantic without considerations for domestic processing and manufacturing facilities along this line, mirrors the extractive investments that African policymakers are moving away from. Moreover, this shows an unwillingness on the part of the Americans to listen to the evolving demands of African policymakers to develop infrastructure that conforms to the long-term economic needs of Africa. In the case of Lobito, it is unsurprising as it is the American government that armed and supported the UNITA rebel group in Angola that bombed the Lobito railway which America now seeks to rebuild to secure its economic security through access to Congolese critical minerals.[78]

On the other hand, the willingness of Chinese entities to develop infrastructure that answers to the demands of host states, regional integration and China's own domestic economic security will allow it to retain its lead in the African mining sector.

[76] U.S International Development Finance Corporation, "DFC Announces Investments Supporting Development Along Lobito Corridor", December 4, 2024.

[77] Mvemba Phezo Dizolele, "*Critical Minerals, Fragile Peace: The DRC-Rwanda Deal and the Cost of Ignoring Root Causes*", June 7, 2025.

[78] Foisie, Jack, "*In Troubled Angola, War and Strife Just Won't Go Away*", June 4, 1980.

Conclusions and Recommendations

As developed countries compete to secure supplies of critical minerals and steer their supplies clear of China's dominance, mineral-producing African are mandating local refining and value addition policies to improve their competitiveness under the African Continental Free Trade Agreement (AfCFTA). This report focuses on two players: Japan and China. Both have been affected by changes in Zimbabwe's mineral policy and have taken different strategies to guarantee their access to Zimbabwe's lithium resources.

Amongst the new entrants in Zimbabwe's lithium industry including: Australia, the United Kingdom, Japan and Canada, Chinese firms have dominated the competition thanks to their willingness to adhere to local refining and value addition policies promulgated by Zimbabwean officials. Chinese firms are developing mines and building refining facilities to process lithium ore within Zimbabwe.

The poor competitive record of Japanese firms in Zimbabwe is traceable to changes in Japan's 21st century Africa policy. The reduced role of Japanese corporations in Japan's Africa diplomacy in favour of an aid driven focus by the Ministry of Foreign Affairs, has been detrimental to Japan's critical minerals policy. The 2022 cut of lithium exports to Japan due to the acquisition of a Zimbabwean mine by a Chinese entity shows the precarious nature of Japan's critical minerals supply chains. For Japan to secure its critical minerals, it must expand its mining operations.

Despite this shortcoming, Japan retains a crucial role in Zimbabwe's mining sector. JICA's long running collaboration with Zimbabwe's Department of the Surveyor General is instrumental in producing geological data that can guide the exploration, development and production of lithium mines in the country. Furthermore, human capacity initiatives like the *Kizuna* exchange program that upskills Zimbabwean mining professionals creates a pool of qualified and experienced professionals that can support the mining activities of Japanese firms.

To complement the ongoing efforts by JICA, it is imperative that Japanese mining entities extend their mining activities to Zimbabwe. Japan's Ambassador to Zimbabwe expressed the high-risk perception Zimbabwe has amongst Japanese entities as trade flows are yet to recover from the 2008 hyperinflation period in Zimbabwe. To change Japanese perception towards

Zimbabwe, joint investment promotion by the Zimbabwe Investment and Development Agency (ZIDA) together with JICA is important.

The insistence on local refining and further value addition of lithium by Zimbabwean officials will increase the entry costs for Japanese entities to mine in the country as they will have to budget for refinery infrastructure regardless of the market price of lithium. Initiatives by Japan's Ministry of Economy, Trade and Industry (METI) to 'onshore' critical mineral processing to Japan and relocate production to South East Asian countries, should be extended to Japanese firms in assisting them set up operations in Zimbabwe. The Japan Organization for Metals and Energy Security (JOGMEC) should avail funding and support for entities establishing operations in Zimbabwe.

As Japan and its partners like the EU work to develop their critical mineral supply chains in Africa, they must temper their views on Chinese investment and their own calls to decouple from China; lest they fall into the trap of developing extractive mineral investments – such as the American led, Lobito Corridor refurbishment deal - which falls short of AfCFTA's manufacturing vision.

In their 'Doing Business in Africa: A Strategic Guide to Entrepreneurs', Dutch researchers noted the shift from critical views of Chinese investment in in Africa to more appreciative views by Dutch entrepreneurs due to the enabling nature of Chinese infrastructure projects.[79]

> "We are very happy about the improved infrastructure in this country, especially the Chinese roads, which are helping us to reach our customers more efficiently".[80]

The Belt and Road Initiative has built roads, railway lines and ports, that will provide a route to market whilst lowering entry costs for investors. As they establish their operations on the continent, they must consider taking advantage of these benefits.

[79] Lem, M., van Tulder, R., & Geleynse, K. *Doing Business in Africa. A strategic Guide for Entrepreneurs.* 2013.

[80] Ibid.

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