

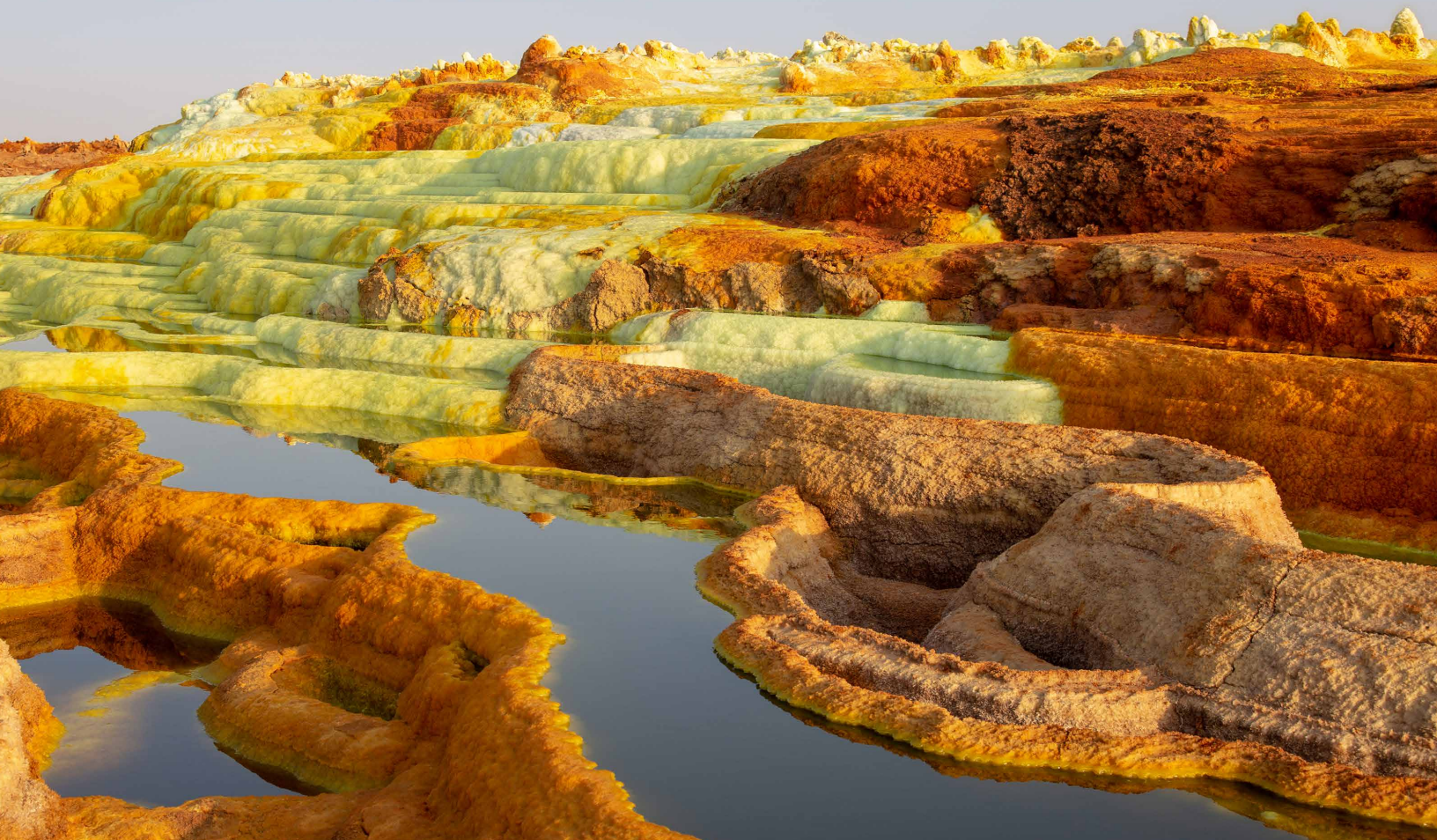


U.S. Chamber of Commerce

**U.S.-Africa
Business Center**

Strategic Ground

**Strengthening America's Security,
Prosperity, and Leadership through
U.S.-Africa Critical Mineral Partnerships**



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About the U.S. Chamber of Commerce

The U.S. Chamber of Commerce is the world’s largest business organization representing companies of all sizes across every sector of the economy. Our members range from the small businesses and local chambers of commerce that line the Main Streets of America to leading industry associations and large corporations. They all share one thing: They count on the U.S. Chamber to be their voice in Washington, across the country, and around the world. For more than 100 years, we have advocated for pro-business policies that help businesses create jobs and grow our economy.

About the U.S. Chamber of Commerce Africa Critical Minerals Working Group

The Africa Critical Minerals Working Group is a platform established by the U.S. Chamber of Commerce’s U.S.-Africa Business Center, serving as a platform to strengthen U.S.-Africa partnerships in the critical minerals sector. By focusing on investment, regulatory alignment, and sustainable development, the Working Group drives the U.S. Chamber’s mission to foster mutually beneficial economic growth with African partners and secure resilient supply chains. As a cornerstone of the U.S.-Africa Business Center’s advocacy efforts, the Africa Critical Minerals Working Group champions smart policies, strategic investments, and innovative solutions to unlock Africa’s critical mineral potential.

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Foreword

Amid surging demand for critical minerals to enable advanced technologies, defense capabilities, and energy systems, the United States faces a defining moment. Our ability to secure robust and resilient supply chains for these resources will not only shape our economic future but also safeguard our national security and global competitiveness.

Trade and investment have long been among the cornerstones of American prosperity. International economic engagement has enabled our businesses to innovate, our workers to thrive, and our communities to grow. Today, these exchanges are more vital than ever. Geology, not elected officials, has distributed mineral resources around the globe, leaving every nation with some dependencies on some imports. To mitigate the risks these dependencies pose, we must diversify our supply chains and forge robust partnerships with resource-rich nations to meet our shared goals.

With its vast reserves of critical minerals, Africa stands at the heart of this effort. The continent's potential to drive the global energy transition and AI revolution is immense. By investing in Africa's critical mineral value chains, the United States can secure a reliable supply of these essential resources while also supporting economic growth and industrialization across the continent.

The U.S. Chamber of Commerce is proud to lead efforts to strengthen these partnerships, advocating for smart policies, strategic investments, and innovative solutions that align with our values and priorities. Through initiatives like the Africa Critical Minerals Working Group, we are committed to ensuring that business and policy work hand-in-hand to create a stronger, more prosperous future.

This white paper outlines a comprehensive strategy to unlock the opportunities in critical mineral supply chains. It is a call to action for all stakeholders, governments, businesses, and civil society, to come together and seize this moment.

The time to act is now. Together, we can turn this vision into reality and ensure that the United States remains a global leader in innovation, economic growth, and shared progress.

John G. Murphy
Senior Vice President and Head of International
U.S. Chamber of Commerce

Executive Summary

The global economy stands at an inflection point. The United States currently faces significant vulnerabilities due to its heavy reliance on concentrated foreign sources of critical minerals, particularly China, which controls an overwhelming 65 to 90 percent of global processing for key metals such as lithium, cobalt, nickel, and copper. Given the history and growing practice of nations imposing export restrictions on critical minerals highlights the urgent and strategic need for a diversified, resilient, and transparent supply chain to safeguard U.S. national and economic security.

To powerfully address this challenge and unlock these opportunities, the U.S. government is advancing a comprehensive, bipartisan strategy focused on bolstering domestic production, enhancing processing capabilities, and forging robust international partnerships. This forward-looking strategy is strongly supported by landmark legislative initiatives, including the Inflation Reduction Act, the CHIPS Act, and the Defense Production Act. A cornerstone of this vital effort is the U.S. Department of Defense's ambitious goal to establish a complete "mine-to-magnet"

rare earth element supply chain by 2027, ensuring defense technologies are not reliant on adversarial nations. Since 2020, the U.S. Department of Defense has strategically invested over \$439 million in pioneering companies to develop domestic rare earth element separation, processing, and permanent magnet manufacturing capabilities. The U.S. Department of Energy is also powerfully advancing this diversification, with plans to issue nearly \$1 billion in funding to support mining, processing, and manufacturing technologies across critical mineral supply chains.

A key pillar of the U.S. strategy, and indeed, a game-changer for global security, is deepening partnerships with Africa, leveraging the continent's vast and underexplored critical mineral reserves. This collaboration offers significant, mutually beneficial opportunities, including securing a diversified and reliable supply of essential minerals, reducing reliance on concentrated sources, and mitigating geopolitical and economic risks. Many African nations are actively seeking to diversify their partnerships away from single actors creating timely and unparalleled opportunities for robust U.S.

engagement. Furthermore, promoting responsible and transparent mining practices is a top priority, as U.S. companies generally adhere to higher standards. Initiatives like the Minerals Security Partnership and the G7 Critical Minerals Action Plan champion high standards, transparency, and local community benefits, offering a stark and important contrast to less responsible approaches. The U.S. Chamber of Commerce's U.S.-Africa Business Center is leading efforts to enhance these partnerships to build a reliable and ethical supply chain for critical minerals, supporting sustainable development and global economic security.

This transformative partnership also fosters mutual economic development and significant value addition within Africa by actively supporting local processing and refining capacity. African nations can proudly move beyond raw material extraction, and the U.S. is powerfully aiding these efforts through technical assistance, geological mapping, workforce development, and strategic infrastructure investments like the Lobito Corridor.

The Lobito Corridor, a strong example of our vision in action, enhances transcontinental connectivity in mineral-rich regions such as Angola, the Democratic Republic of Congo, and Zambia, promising economic transformation and a potential GDP boost. Aligning strategic policy and trade frameworks is another critical component of this collaboration. Investment incentives and preferential market access for African mineral producers are being actively explored to ensure alignment with U.S. mineral security goals. It is imperative to note that current benefits under U.S. legislation largely exclude mineral-rich African countries, inadvertently discouraging manufacturers from sourcing there. Addressing this gap is essential to fostering stronger partnerships.

By ensuring secure, sustainable, and resilient critical mineral supply chains, the United States can safeguard its economic and national security while fostering global partnerships and development for generations to come.

Context: Africa's Centrality to Global Critical Mineral Security

The world is rapidly changing thus necessitating a dramatic increase in the production and responsible sourcing of critical minerals. These minerals form the bedrock of everything from electric vehicles (EVs) and solar panels to semiconductors and advanced defense systems. Africa's role in this unfolding scenario is not just indispensable, but central to the future of global mineral security. The continent boasts approximately 30% of the world's known critical mineral reserves, including over 70% of global cobalt output, significant shares of manganese, graphite, platinum group metals, and substantial, yet-to-be-explored lithium deposits. This vast mineral wealth positions Africa as a key player in the global market, poised to drive both

economic prosperity and sustainable development across the continent, making it a driving force in the global energy transition and the rapidly advancing AI revolution.

The global demand for these resources is projected to more than double between now and 2030. This is Africa's moment: if dramatic, proactive changes are not made within the next five years by governments, investors, and development partners, African nations risk missing a historic and transformative opportunity to leverage this demand for industrial growth, skills acquisition, and widespread job creation. As the adage goes, the time to invest in Africa is now.

Core Challenges Impeding Progress

Despite Africa's immense opportunities and role in the global economy, several formidable challenges currently impede the establishment of resilient mineral supply chains. Addressing these directly and collaboratively is imperative for unlocking the continent's full potential and fostering truly beneficial, long-term partnerships.

Investment Risk & Persistent Financing Gaps:

The perception of high political and regulatory risk, coupled with inherent geopolitical instabilities and the complex history of mining in Africa, currently deters crucial private investment in value chains.

Early-stage exploration, a high-risk endeavor, often struggles to attract traditional lenders, leading to Africa accounting for only 10% of the global exploration budget, a figure starkly at odds with its vast potential.

Compounding these issues are lengthy approval processes, long development cycles (typically 15+

years for a new mine), commodity price volatility, and currency fluctuations, which further complicate investment and project bankability without robust offtake agreements. It is risky for a U.S. business to have a global strategy that does not intend to invest in Africa. While Western investors often view Africa primarily through a lens of risk, competitors proactively prioritize opportunity and are thus more motivated to address risks as they emerge.

Infrastructure Deficiencies:

A significant obstacle to local processing and industrialization is the critical lack of adequate energy, transportation, and digital infrastructure across much of the continent. Mineral processing, in particular, is exceptionally energy-intensive, far exceeding the needs of extraction, posing a serious challenge in regions with limited or unreliable power grids. Yet, projects like the Lobito Corridor are demonstrating how these challenges can be overcome through strategic, multi-national partnerships and investment.

Dominance of Concentrated Foreign Sources:

The heavy reliance on a single, concentrated foreign source, such as China, for critical mineral processing presents a significant vulnerability for the United States and global supply chains. This dominance, often secured through state-backed financing and infrastructure-for-resources deals, limits African agency and value capture. Our strategic partnerships offer a powerful alternative, ensuring diversified and secure access.

Limited Local Value Addition:

Historically, African nations have primarily exported raw materials, hindering local economic growth and industrialization. While policies are being developed

to require local refining, institutional bottlenecks and a lack of domestic industrial capacity often mean that raw or semi-processed materials are still exported, preventing African countries from moving up the value chain. This is a missed opportunity which cane be easily rectified through collaborative efforts to build processing capabilities.

Weak Rule of Law and Governance:

Weaknesses in the rule of law, including issues of property rights, transparency, anti-corruption, and operational standards, deter high-quality and responsible foreign investment. Instances of arbitrary taxes, opaque tax codes, and political instability create unpredictable operating environments for firms.

Policy And Commercial Recommendations:

We stand at a watershed moment. By strategically de-risking investments and actively bridging financing gaps, we can unleash unprecedented private capital into African critical mineral value chains, transforming nascent opportunities into flourishing, resilient industries. Our commitment to African partners will provide the certainty and support needed to navigate complex markets and deliver long-term, mutually beneficial value. The U.S.-Africa Business Center is dedicated to advocating that business and policy align to create a stronger, more sustainable supply chain, focusing on future-oriented policies, building skills and infrastructure.

and investors that fosters confidence. It is imperative to broaden eligibility for investment incentives beyond restrictive definitions, recognizing that geology dictates where these essential resources reside. This must include mineral-rich strategic partners in Africa, even those without traditional trade agreements, to maximize global access to vital resources.

- Expand Flexibility of Finance:**

American finance institutions, such as the U.S. International Development Finance Corporation (DFC) and the Export-Import Bank of the United States (EXIM), are powerful catalysts for private investment. We must amend DFC rules to facilitate more equity investments in mining projects, which sends a powerful signal that mobilizes additional private capital and fosters robust government-to-government cooperation. Streamlining DFC’s approval processes and increasing its risk appetite are crucial for agile, responsive investments, particularly in Africa where long approval

A. Financing and Risk Mitigation

- Strategic Policy Alignment for Investment:**

The United States must clearly and unequivocally articulate its mission to develop secure and responsible critical mineral supply chains, sending a unified signal to partner governments

timelines are a significant concern. Similarly, EXIM should possess the flexibility to provide debt financing at the company level and relax domestic content requirements to support strategic projects more broadly. Bolstering political risk insurance mechanisms from DFC and the Multilateral Investment Guarantee Agency (MIGA) can further de-risk investments in high-risk jurisdictions like the Democratic Republic of Congo, providing protection against expropriation, political violence, and currency inconvertibility. These reforms are vital to enhancing DFI (Development Finance Institutions) capacity to meet U.S. minerals security needs.

B. Infrastructure and Corridor Development

- Incentivizing Private Sector Infrastructure Participation:**

To mobilize the necessary capital and expertise, we must proactively utilize public-private partnership (PPP) frameworks to incentivize robust private sector involvement in infrastructure development across Africa. Strategic partnerships with global industry leaders are actively sought to maximize both impact and efficiency. The U.S.-backed Lobito Corridor initiative stands as a notable example of strengthening transcontinental connectivity and supporting infrastructure development in mineral-rich regions. This transformative project will open avenues for U.S. businesses to establish partnerships, diversify supply chains, and contribute to the economic development and diversification of the region. This approach is critical for addressing the significant infrastructure gap in African countries, which often impedes the development of mining and processing industries. The U.S.-Africa Business Center and our American Chambers of Commerce are actively engaged in the development of the Corridor, organizing executive ministerial roundtables to focus on financing the energy transition and convene public and private sector leaders.

C. Policy and Regulatory Alignment

- Enhancing Midstream Processing and Refining Capacity:**

A cornerstone of our strategy involves investing in domestic and allied midstream processing and refining capabilities, especially within Africa. This includes developing a comprehensive incentives package for mineral production and processing that goes beyond existing legislation, specifically targeting key industries such as defense, semiconductors, and EVs. This strategy will not only reduce vulnerabilities in supply chains but also create higher-value products and foster industrialization in Africa. A notable success, and a testament to this vision, is the DFC-backed Syrah graphite processing facility in Louisiana, which sources graphite from Mozambique, creating the first vertically integrated graphite supply chain outside of other key global actors. Such investments are crucial, as China currently dominates 65 to 90 percent of the global processing of key metals like lithium, cobalt, nickel, and copper. This emphasis on value addition is powerfully aligned with African aspirations to transform raw materials into high-value products and retain more than just ore.

- Streamlining Domestic Permitting Processes:**

To establish a diversified and resilient critical mineral supply chain, the United States must reform its permitting processes, which currently average 29 years to build a mine, the second-longest timeline globally, requiring up to 30 often duplicative permits. This inefficiency is not just a domestic issue but a global barrier that constrains mineral supply. By streamlining permitting processes, adopting best practices, and integrating advanced technologies, the U.S. can accelerate domestic production while setting a benchmark for partners in Africa. A modernized mechanism for permitting reform, could provide a streamlined, predictable process managed by a single authority, ensuring environmental reviews and public participation remain integral. Nations such as Chile and Saudi Arabia are adopting or exploring similar modernized systems to enhance efficiency and attract additional investment.

Improving domestic permitting practices not only reduces project timelines but also creates models and expertise that can be shared with African nations to expedite mine and processing facility development. Advanced technologies like AI, satellite data, and drone-based monitoring can further lower exploration and compliance costs in African markets, helping them avoid delays that often hinder U.S. projects. This dual approach, enhancing domestic efficiency while supporting global development, is essential for fostering a diversified supply chain, reducing reliance on concentrated foreign sources and building a robust, mutually beneficial ecosystem that aligns U.S. economic and national security priorities with Africa’s development goals.

- Developing a Unified and Coordinated Strategy:**

It is essential to establish a clear, comprehensive national critical minerals strategy with a single point of accountability to oversee and coordinate government efforts, ensuring a focus on Africa. An interagency task force, potentially led by the National Security Council, would ensure mission clarity, guard against mission creep, and optimize resource allocation, including for robust African engagement.

- Harmonizing Policies and Regulatory Predictability:**

There is a need to directly address issues such as royalties, taxes, and lease terms, with the clear aim of harmonizing mining and investment policies across partner nations to promote regional coordination and predictability. Commercial officers should be on the ground in key African countries, like the newly established Commercial Service Offices in Côte d’Ivoire and Zambia, to actively identify opportunities and provide essential support. The U.S. Department of Commerce’s Commercial Law Development Program (CLDP) can also assist with improving licensing systems, enforcing anti-bribery laws, and building trusted dispute resolution frameworks to benefit U.S. investors.

- Incentivizing Beneficiation and Value Addition:**

Policies must actively promote beneficiation through incentives aligned with host-country development goals and industrial strategies in Africa. This approach should prioritize phased value addition, focusing initially on commercially and industrially viable segments of the value chain rather than attempting to leap directly to advanced manufacturing, drawing lessons from examples like Indonesia’s mixed success in its nickel sector, which was heavily dependent on external market and technology factors.

D. Promoting Transparency

The mining industry’s complex history demands a proactive stance on transparency and accountability. Our recommendations focus on establishing enforceable standards, leveraging innovative technology, and empowering local stakeholders to ensure sustainable and ethical supply chains; particularly in Africa where these issues are acutely felt.

- Promoting Transparency and Community Engagement:**

Ensuring transparency and accountability across critical mineral supply chains is essential to fostering trust and building strong partnerships. This includes promoting transparency around bidding processes, robust community engagement, and fair practices that prioritize the interests of host communities. Responsible mining practices, coupled with open and inclusive processes, will differentiate our partnerships and position us as reliable and trusted collaborators. Initiatives like the Minerals Security Partnership (MSP) emphasize these principles, advocating for practices that deliver tangible benefits to local communities. Additionally, incorporating voluntary responsible mining standards into trade agreements can further encourage fair practices in the sector.

- **Formalize Artisanal and Small-Scale Mining (ASM) Sectors:**

The informal nature of ASM in Africa often leads to human rights violations and child labor, yet it accounts for an estimated 20 percent of the Democratic Republic of the Congo (DRC)’s mineral output and employs around two million people according to CSIS. Formalizing and professionalizing this sector requires strategic government investment in permitting, registration, and enforcement of safety and human rights regulations. For example, 200 labor inspectors were trained to support ASM operations in the DRC. However, their full deployment remains a challenge, highlighting the importance of effectively implementing formalization policies. Technology platforms can also significantly improve ASM productivity by providing geological and geospatial information, reducing wasted effort, and enabling better assessment and engagement of miners for social services and credit. Implementing market-oriented structural innovations, such as blockchain-based community mining rights, could generate long-term local wealth for indigenous groups. Such efforts are crucial for improving livelihoods and advancing integrated rural social and economic development, aligning with the African Mining Vision.

- **Advocating for Transparency in Agreements:**

Greater transparency and public accessibility in resource agreements across Africa will help to foster informed public discourse and ensure that these partnerships align with broader societal interests and development goals, moving beyond vague and non-binding agreements to foster democratic accountability and human rights.

E. Enhancing Technical Expertise

The United States’ greatest asset is, without question, human ingenuity. By investing strategically in talent development and fostering a dynamic culture of innovation, we empower local communities, create highly skilled workforces, and accelerate technological breakthroughs. This profound commitment to expertise strengthens bilateral relationships and ensures that our partnerships are built on a foundational shared knowledge and mutual growth, fundamentally advancing African agency and self-reliance. The increasing complexity of modern mining and processing demands specialized skills, and existing gaps in African human and technical capabilities must be systematically addressed. A comprehensive approach combines direct training, academic collaboration, and targeted support for innovation to build a self-sustaining ecosystem of expertise that fosters local value addition and industrialization throughout Africa.

- **Developing a Skilled Critical Minerals Workforce:**

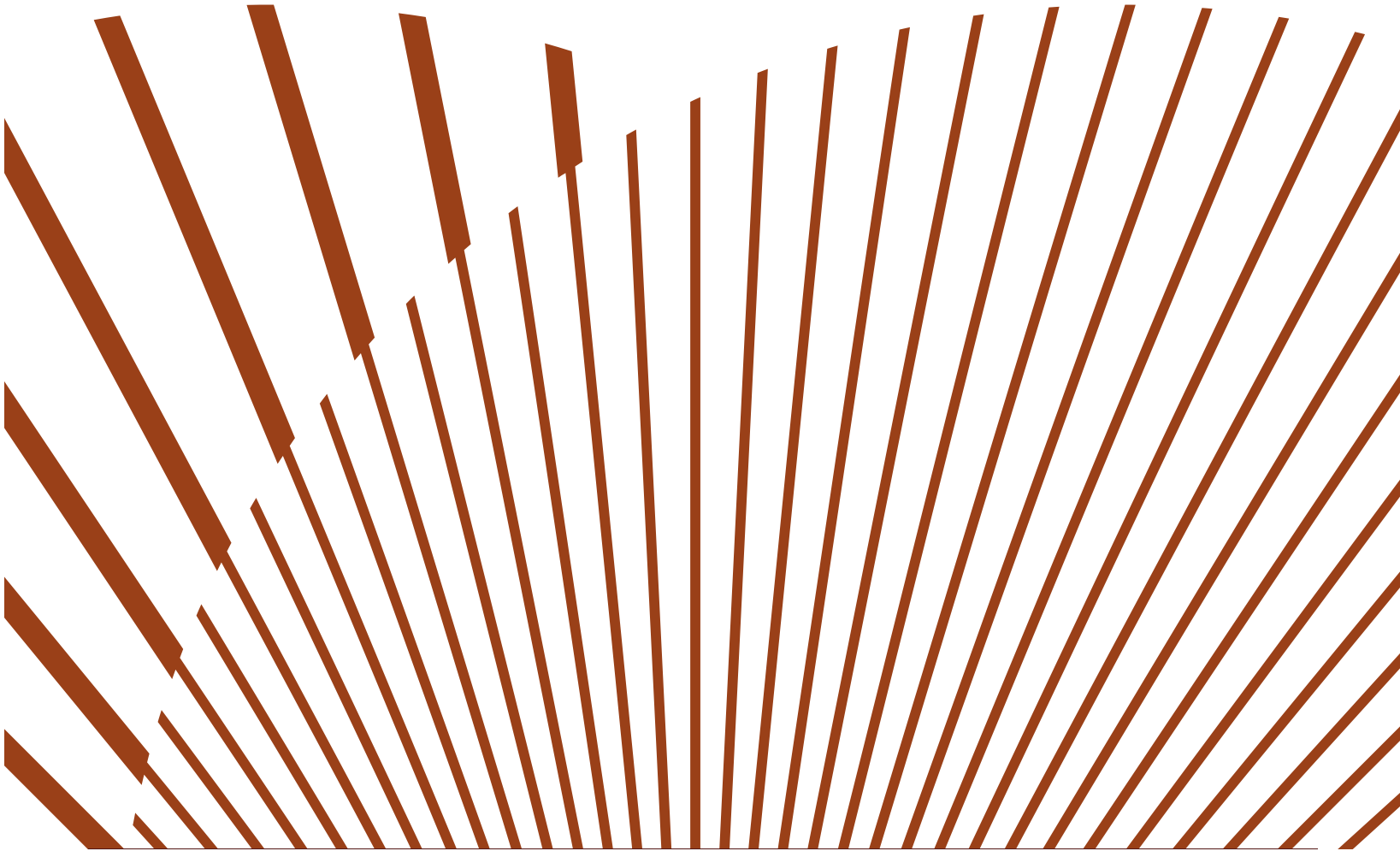
By making significant and sustained investments in education, training, and lifelong learning to cultivate a highly skilled workforce in mining, materials science, advanced processing, refining, defense applications, and advanced manufacturing across Africa. This is crucial to address the projected retirement of more than half of the current mining workforce by 2029 (approximately 221,000 workers) and to empower African nations to capture higher value from their own resources. The U.S. Geological Survey (USGS) can also undertake geological mapping and de-risk exploration in priority jurisdictions, embedding attachés at embassies to collaborate with local geological surveys and mining ministries. Furthermore, the U.S. Army Corps of Engineers (USACE) and U.S. Africa Command (AFRICOM) possess technical expertise in civil engineering, construction, and transportation security that can be leveraged for job training and skills building in Africa, providing critical support for infrastructure development and regional stability.

- **Providing Targeted Technical Assistance:**

Comprehensive technical assistance for capacity building in partner countries, including essential support for legal and regulatory reforms and effective natural resource management. This directly and powerfully empowers local institutions and human capital in Africa, helping them to better understand the industry, negotiate contracts, and manage their resources transparently. Extending the scope of initiatives like the MSP to include technical assistance, particularly geological surveys and resource mapping, can further unlock Africa’s mineral potential by de-risking investments for exploration companies.

- **Investing in R&D for Innovation and Efficiency:**

By funding cutting-edge research into battery technologies that utilize smaller quantities of critical materials or explore more abundant substitutes thereby reducing dependencies and fostering innovation. A core focus will be on strengthening the circular economy through advanced recycling technologies and smart policies to maximize resource efficiency and minimize waste across the entire mineral lifecycle. This includes research into battery design to enhance recycling potential and developing innovative processing solutions that are cleaner, faster, and more energy-efficient.



Conclusion: A Shared Future, Forged In Partnership

The journey to secure resilient, transparent, and transparent critical mineral supply chains is undeniably complex, yet it is a challenge uniquely suited to our collective capabilities, with Africa standing at its very heart. Achieving this transformative vision requires a comprehensive approach that integrates strategic policy alignment, catalyzes investment, builds critical infrastructure and advanced processing capabilities, cultivates technical expertise, and ensures transparency at every stage. This is not merely a vision; it is a profound commitment to a transformative U.S.-Africa partnership, one that promises mutual prosperity and global stability.

Africa’s vast and underutilized mineral wealth represents more than an opportunity; it is a cornerstone of the energy transition and the rapidly advancing AI revolution, both of which are essential to the national security and economic competitiveness of the United States. Recognizing that no nation can achieve full independence in critical mineral supply chains alone, the United States must proactively engage with resource-rich African nations as indispensable partners. This engagement transcends

traditional extractive models, fostering sustainable economic development across the continent while securing long-term, diverse supply for U.S. industries.

By proactively advancing investment, developing essential infrastructure and processing capabilities, aligning strategic policies, promoting transparency, and enhancing technical expertise, we can move beyond reactive measures to establish proactive and enduring leadership. This strategy not only addresses vulnerabilities in global supply chains, but also lays a robust foundation for African industrialization, widespread job creation, and strengthened regional integration through initiatives like the African Continental Free Trade Area (AfCFTA) and regional processing hubs. It represents a bold commitment to a new era of partnerships that are economically viable, geopolitically strategic, and profoundly mutually beneficial.

The opportunity to position Africa at the center of a resilient global critical minerals future is unequivocally here, and with U.S. leadership and dedication, we are poised to turn this vision into a vibrant future.

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Stakeholder Dialogues

This section formally attributes the non-public policy roundtables convened by the U.S. Chamber of Commerce, which consolidated the extensive stakeholder engagement and policy dialogues necessary to produce the white paper's private sector-driven roadmap and actionable recommendations for securing critical mineral supply chains.

1. U.S. Chamber of Commerce. Advancing Collaboration on Critical Minerals: Building Sustainable Supply Chains. Washington, D.C., February 21, 2025.

2. U.S. Chamber of Commerce. U.S.-Côte d'Ivoire Roundtable on Critical Minerals and Energy Financing. Washington, D.C., March 18, 2025.

3. U.S. Chamber of Commerce. U.S.-Africa Strategic Minerals Policy Roundtable. Washington, D.C., June 5, 2025.

4. U.S. Chamber of Commerce. U.S.-Africa Critical Minerals Roundtable. Washington, D.C., April 9, 2025.



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