ECOFIN AGENCY · ZAMBIA

Zambia opens rail network to private operators for copper push

Saga deep read · 13 November 2026 · Score 58

Zambia is moving to allow private companies to operate freight and passenger trains on its national rail network, a structural reform aimed at improving transport capacity and attracting investment as the country targets annual copper production of 3 million tonnes.

The plan centres on opening access to existing rail infrastructure rather than exclusive concession arrangements, enabling multiple private operators to run services alongside any state-managed operations. The reform is intended to give mining companies and agricultural producers additional and more reliable routes to export markets, reducing dependence on road haulage and alleviating logistics bottlenecks that have constrained Zambia's commodity export volumes.

Copper is central to the rationale. Zambia is one of Africa's leading copper producers, and the government has set an ambitious target of reaching 3 million tonnes of annual output. Achieving that level of production will require not only expanded mine development but also a step-change in the country's ability to move ore and refined metal efficiently to ports and processing facilities. Rail is widely regarded as the most cost-effective and scalable freight mode for bulk commodities over long distances, making rail reform a logical complement to mining investment.

The proposed changes would also benefit the agricultural sector, which has historically struggled with high transport costs that erode farm-gate margins and limit access to regional and international buyers. Improved rail connectivity could

open new corridors for export crops, broadening the economic base of the reform beyond the extractive sector.

Zambia's rail network has suffered from decades of under-investment, limiting its capacity, reliability, and speed. Attracting private capital and operational expertise is seen as the most practical path to reversing that decline without placing the full burden of rehabilitation on the public purse. The government's approach of permitting open access — allowing private train operators to use tracks they do not own — mirrors models adopted in other jurisdictions seeking to inject competition and efficiency into legacy rail systems.

The reform remains at the planning stage. No specific legislation, regulatory framework, timelines, private operator agreements, or capital commitments have been disclosed in connection with this announcement. The scale of infrastructure upgrades required and the terms under which private operators would access the network are yet to be detailed publicly.

For the mining sector, the direction of travel is clear: Zambia's ability to attract and retain the investment needed to reach its copper production target will depend in part on whether this logistics reform delivers tangible improvements to export reliability and cost. Rail access is increasingly a factor in mining project economics, particularly for landlocked producers where port distance and corridor choice materially affect margins.

Why this matters to partners and clients of Saga

This is a policy announcement at an early planning stage with no contracts, tenders, or procurement activity disclosed; Norwegian service companies with interests in Zambian mining logistics should monitor regulatory developments and engage with mining operators already active in-country to understand how rail reform may affect project planning and equipment transport requirements. No procurement outreach is warranted at this stage.

PARTNER ANGLES

- **Pipeline:** Monitor whether rail corridor development influences routing decisions for future mineral slurry or bulk infrastructure projects in the Zambian Copperbelt.
- **Drilling:** Track how improved rail logistics may reduce mobilisation costs for drilling equipment serving Zambian copper and associated mineral projects.
- **Service:** Assess whether open-access rail reform creates opportunities for equipment leasing, rolling stock maintenance, or logistics management services linked to mining client supply chains.
- **Subsea/FPSO:** Limited direct relevance; monitor as an indicator of Zambia's broader infrastructure reform appetite, which may signal future openness to energy sector investment.

Original source: Ecofin Agency →

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