JEUNE AFRIQUE ÉCONOMIE

China's Sulfuric Acid Embargo Squeezes DRC Copper Mining Operations

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The Democratic Republic of Congo's mining sector is facing mounting pressure from two converging external shocks: the ongoing conflict in the Middle East and Beijing's decision to suspend exports of sulfuric acid, a critical chemical reagent used in hydrometallurgical copper processing. The combination is straining operations across one of the world's most significant copper and cobalt producing regions, with consequences that extend well beyond the DRC's borders.

Sulfuric acid is indispensable to the solvent extraction and electrowinning (SX-EW) process, the dominant method used by large-scale copper miners in the DRC's Katanga province to produce cathode copper. China has historically been a primary supplier of the chemical to African mining operations, and Beijing's embargo — triggered in response to regional tensions linked to the Iran conflict — has left operators scrambling to identify alternative supply chains. With no immediate substitute supplier at comparable scale or cost, producers face the prospect of reduced throughput or outright curtailment of processing capacity.

The timing is particularly damaging. The DRC accounts for roughly 70 percent of global cobalt production and is among the top five copper producers worldwide. Any sustained disruption to processing capacity has direct implications for global battery supply chains, EV manufacturers, and the energy transition metals market. Major operators including Glencore, Ivanhoe Mines, and a constellation of Chinese joint-venture partners have significant capital deployed in the region and are now

navigating an input cost and availability crisis that was largely unforeseen at the start of the fiscal year.

Beyond the immediate chemical supply crunch, the episode highlights the structural vulnerability of DRC mining infrastructure to geopolitical shocks originating thousands of kilometres away. The country's road and rail logistics remain underdeveloped, limiting the speed with which alternative acid supply — potentially sourced from Southern Africa, the Middle East, or Europe — could be rerouted into Katanga. Port congestion at Durban and Dar es Salaam, the two primary import gateways for heavy industrial inputs into the DRC's landlocked mining belt, adds further friction to any rapid resupply effort.

For the broader African critical minerals investment community, the crisis underscores the need for in-region sulfuric acid production capacity — a gap that some operators have explored through smelter-linked acid plants but which remains largely underdeveloped at the scale the DRC requires. Industry observers expect short-term production guidance downgrades from several operators as Q3 and Q4 processing schedules are revised. The situation is being closely watched by commodity traders and off-take agreement holders, particularly those with exposure to long-term cobalt and copper contracts tied to DRC output volumes.

Why this matters to partners and clients of Saga

Norwegian companies with exposure to industrial infrastructure, logistics, and process engineering should monitor this situation as a potential entry point for downstream mining support services, particularly around chemical handling, storage, and alternative reagent supply chain infrastructure. The crisis may also accelerate investment in local smelting and acid plant capacity, where Norwegian engineering and project management firms could find tendering opportunities. Companies tracking DRC as part of a broader African critical minerals strategy should treat current disruptions as a medium-term risk factor affecting project timelines and partner financial stability.

PARTNER ANGLES

- **Pipeline:** Acid and chemical feedstock logistics infrastructure in southern DRC represents a potential project development angle as operators seek to reduce dependence on Chinese imports.
- **Service:** Process engineering and chemical handling specialists could position themselves to support DRC miners evaluating alternative SX-EW reagent sourcing and plant adaptation.
- **Subsea/FPSO:** Indirectly relevant — cobalt supply disruptions affect battery supply chains and, by extension, the pace of electrification investment that competes with oil and gas demand forecasts.
- **Drilling:** Monitor financial health of DRC-exposed mining operators as credit stress could delay associated energy and utilities infrastructure tenders in the Katanga mining belt.
- **LNG:** Sustained mining output reductions in DRC may slow industrial energy demand growth, affecting the commercial case for LNG-to-power projects targeting the mining corridor.

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