



IGF

INTERGOVERNMENTAL FORUM
on Mining, Minerals, Metals and
Sustainable Development

COUNTRY PROFILE

Zambia



POPULATION
22.5 million (2026)



TOTAL AREA
752,617 km²



CAPITAL
Lusaka



GDP
USD 28.8 billion
(2025)



IGF MEMBER

1. Geological Considerations

1.1 Mining-Relevant Scorecard

Mining-relevant scorecard

Published critical mineral strategy^D

2024

National Critical Minerals Strategy 2024-2028 (2024)

International coordination mechanisms (mining related, in force)^C

2026

Multiple: China (2010), India (2019), United States (2022), Japan (2023), United Kingdom (2023), European Union (2023)

Logistics Performance Index (1-5)^F

2018

Score: 2.53

Mineral rents (% GDP)^F

2021

Share: 28.25

Trade or export restrictions^E

2025

Commodities: Cobalt, copper

Electricity access (% of the population)^F

2023

Score: 51.1

Internet access (% of population)^F

2023

Score: 33

State-owned/affiliated mining company^A

2025

ZCCM Investments Holdings Plc (ZCCM-IH) formerly Zambia Consolidated Copper Mines Limited (ZCCM Ltd.)

Extractive Industries Transparency Initiative (EITI) Membership^B

2021

Yes

*ZCCM-IH is an investment holding company rather than a single mine operator. It holds interests in several mining companies, including 20% of Kansanshi Mining, 20% of CNMC Luanshya Copper Mines, 20% of Lubambe Copper Mines, and 20.6% of Konkola Copper Mines, while also wholly owning several mining subsidiaries.

Sources: ^AAfrican Minerals Development Center, n.d.; ^BEITI, 2025; ^CInternational Energy Agency (IEA), 2024;

^DMinistry of Mines and Minerals Development (MoMMD), 2024; ^EOrganisation for Economic Co-operation and Development (OECD), 2025; ^FWorld Bank Open Data, n.d.

1.2 Reserves

Reported key mineral reserves of major mining products in Zambia as of 2025

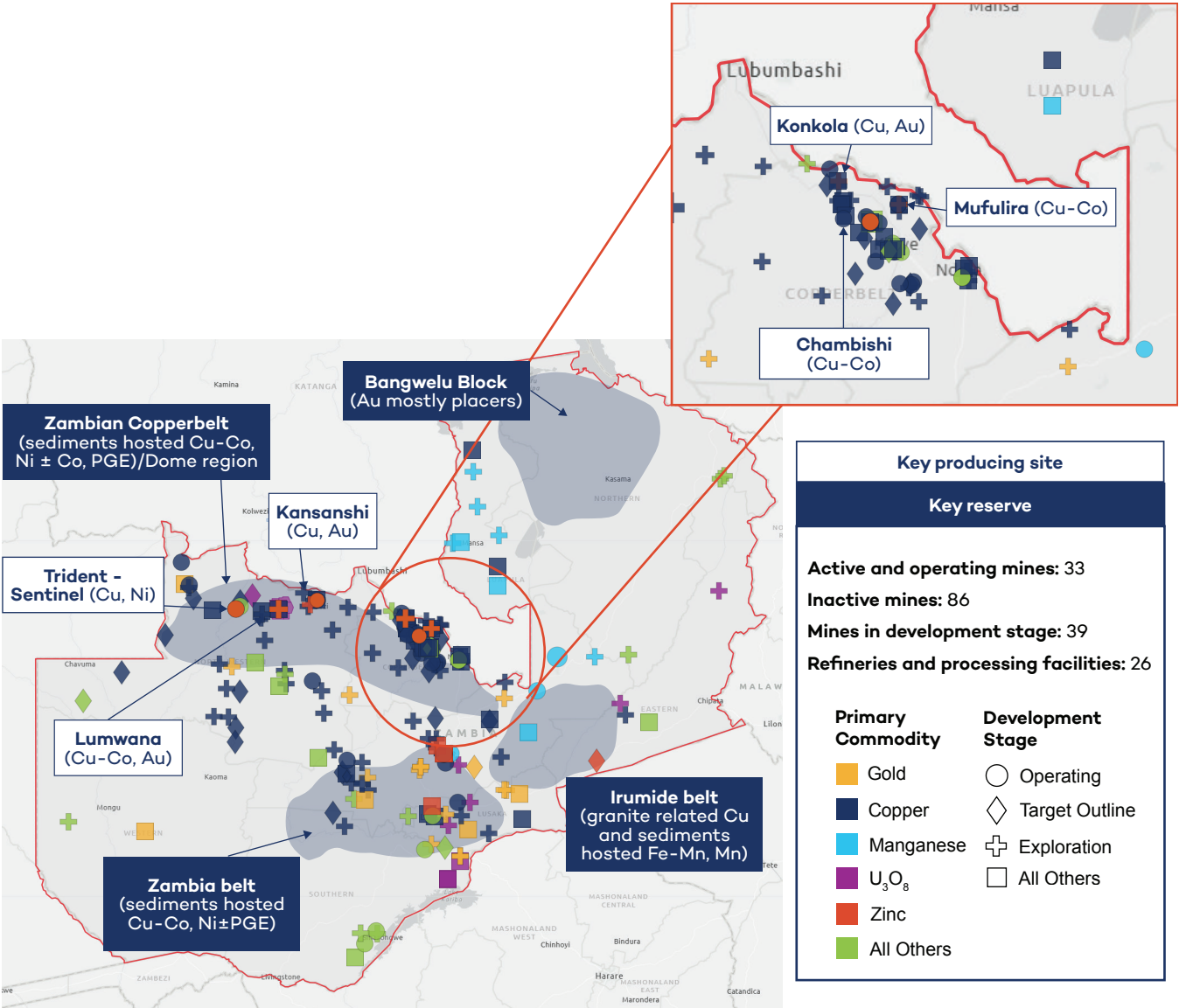
Commodity*	Quantity (thousand of metric tonnes, '000 mt)	Notes
Copper	21,000	Copper content
Manganese	430	Manganese content
Cobalt	270	Cobalt content

Sources: Sinkana et al., 2025; U.S. Geological Survey, n.d.-a, n.d.-c.

*Note: Zambia also produces nickel, gold, and various gemstones, although reserve estimates are not available for these commodities.

1.3 Key Mines and Producing Sites

Key mining regions and producing projects by commodity, 2025



Source: S&P Global Market Intelligence, 2026a, 2026b.

1.4 Key Mining Projects

Key operational mining projects by commodity, Zambia, 2025

Trident - Sentinel

Main commodity: Copper
Production (2025e): 189,040 mt copper, 23,184 mt nickel
Global production share: 0.8% copper, 0.5% nickel
Controlling company: First Quantum Minerals Ltd.
Notable by-products: Cobalt, nickel

Lumwana

Main commodity: Copper
Production (2025e): 150,871 mt copper
Global production share: 0.6% nickel
Controlling company: Barrick Mining Corp.
Notable by-products: Gold, cobalt

Chambishi

Main commodity: Copper
Production (2025e): 55,464 mt copper, 5,635 mt cobalt
Global production share: 0.2% Copper, 2% Cobalt
Controlling company: China Nonferrous Mining Corp. Ltd.
Notable by-products: Cobalt

Konkola

Main commodity: Copper
Production (2025e): 70,000 mt copper
Global production share: 0.3% copper
Controlling company: Vedanta Inc.
Notable by-products: Cobalt

Kansanshi

Main commodity: Copper
Production (2025e): 181,183 mt copper, 3.6 mt gold
Global production share: 0.8% copper, 0.1% gold
Controlling company: First Quantum Minerals Ltd.
Notable by-products: Gold

Mufulira

Main commodity: Copper
Production (2025e): 47,000 mt copper
Global production share: 0.2% copper
Controlling company: Intl Resources Holding
Notable by-products: Cobalt

Kagem

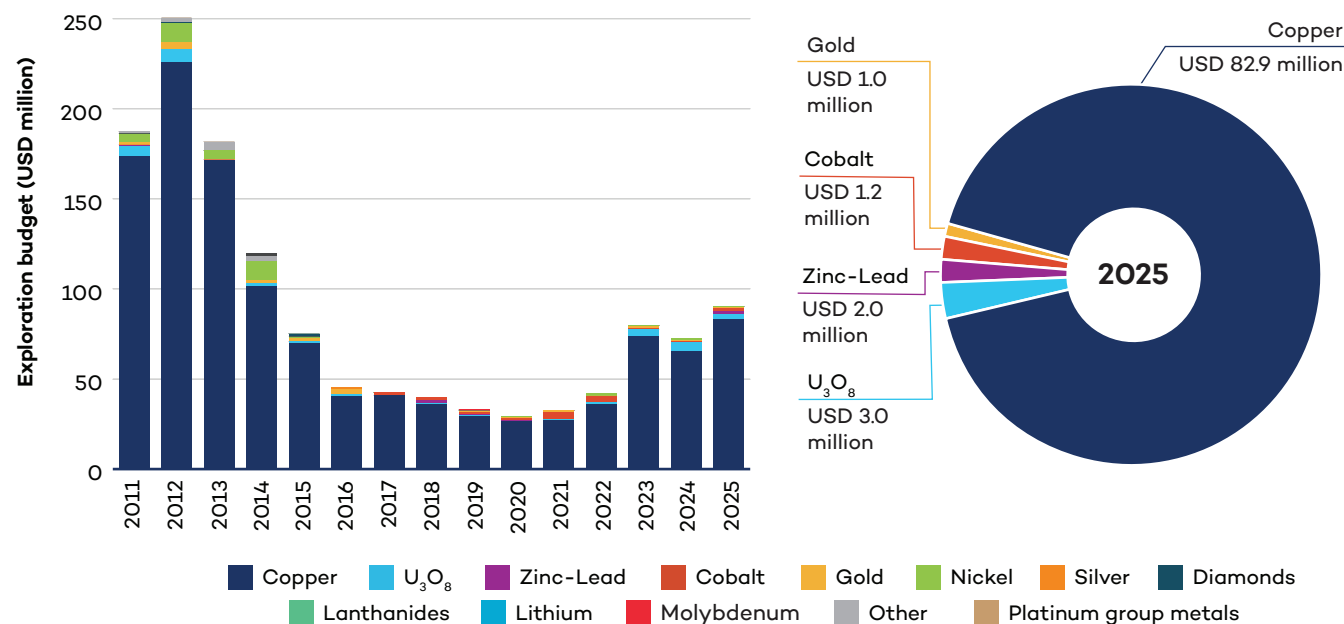
Main commodity: Emerald
Production (2025e): ~2 t
Global production share: ~25%
Controlling company: Gemfields Group
Notable by-products: Beryl

Note: The selected minerals and metals represent Zambia's top revenue-producing commodities; the mining properties listed are the top active and operational projects by production volume for selected commodities for the year 2025.

Source: S&P Global Market Intelligence, 2026a; U.S. Geological Survey, n.d.-a, n.d.-c.

1.5 Exploration

Exploration budget (USD million) and national exploration budget share per commodity (% , 2025)



Source: S&P Global Market Intelligence, 2026a.

Zambia's exploration budget peaked at approximately USD 500 million in 2012, following already high spending of about USD 370 million in 2011. Investment then declined steadily, falling below USD 100 million after 2015 and reaching a low of around USD 60 million in 2020. Exploration spending subsequently recovered, rising to about USD 160 million in 2023 and approximately USD 180 million in 2025, although it remains well below the levels recorded in 2012.

Copper overwhelmingly dominated the 2025 exploration budget, accounting for 92% of the total, or approximately USD 166 million. Uranium represented about 3%, or USD 5.4 million, while cobalt and zinc-lead each accounted for around 2%, or USD 3.6 million. Gold represented approximately 1%, or USD 1.8 million. The distribution reflects Zambia's strong concentration on copper exploration, with only limited investment directed toward diversification into other commodities.

1.6 Artisanal and Small-Scale Mining

Artisanal and small-scale mining (ASM)

ASM in Zambia is governed primarily by the Mines and Minerals Development Act of 2015 and the Geological and Minerals Development Act No. 2 of 2025. These laws reserve ASM licences for Zambian citizens and Zambian citizen-owned companies. Artisanal mining licences are valid for 2 years, while small-scale mining licences are valid for 10 years. ASM producers of gemstones and gold are subject to a 6% mineral royalty.

The Government of Zambia has introduced several measures to support the formalization and development of the ASM sector. These include technical training, an ASM Fund providing microloans to miners, the suspension of export duties on gemstones, and the establishment of public-private joint ventures to purchase and process ASM production (U.S. Geological Survey, n.d.-a).

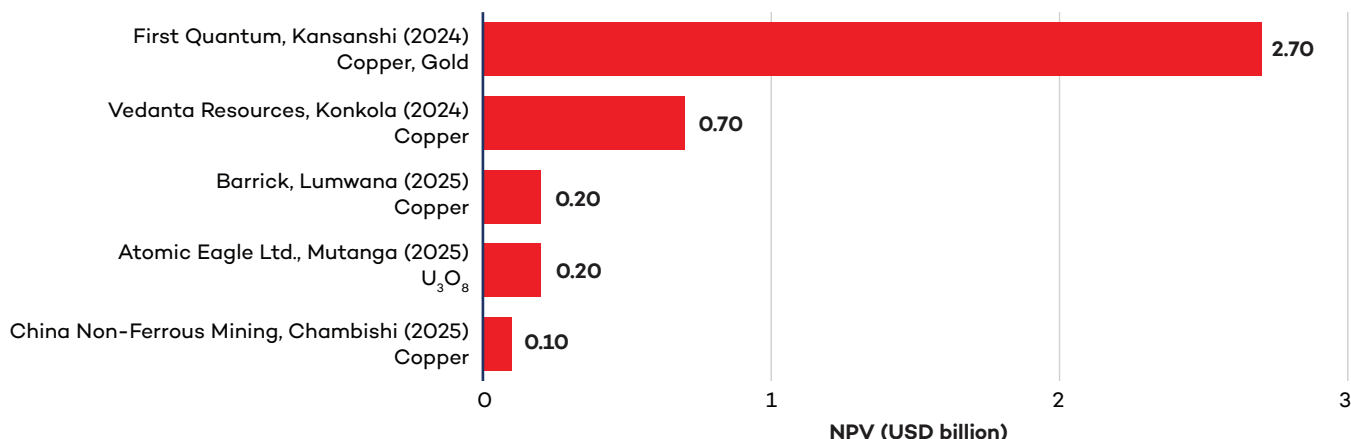
ASM operators in Zambia produce emeralds, amethyst, tourmaline, gold, copper, manganese, aggregates, and other industrial minerals. Gemstones have historically dominated the sector (Kaczmarek et al., 2025). ASM was estimated to account for approximately 33% of national gold production in 2013 (Seccatore et al., 2014; U.S. Geological Survey, n.d.-a) and 4% of copper production in 2022 (Zambia EITI, 2026). ASM manganese operations in the Mansa area of Luapula Province and the Mkushi area of Central Province are estimated to have a combined production capacity of approximately 120,000 metric tonnes per year (U.S. Geological Survey, n.d.-a).

Estimates of Zambia's ASM workforce vary widely, ranging from 30,000 to 500,000 (African Minerals Development Centre [AMDC], 2017; Artisanalmining.org, 2026). These differences likely reflect variations in definitions (Cooper & Goliath, 2023).

Women are estimated to account for between 30% and 50% of Zambia's ASM workforce. Children have also been reported to be present at ASM sites, with some estimates suggesting that they may represent up to 30% of people observed in and around mining areas. However, these figures do not necessarily indicate verified employment in mining activities and may also include children accompanying family members or living in nearby mining communities (AMDC, 2017; Zambia EITI & Oxfam, 2019). ASM licence ownership remains predominantly male. Among 550 small-scale mining licences and 344 artisanal mining licences assessed by Zambia EITI & Oxfam (2019), 83% of site owners were men. Approximately 69% of licensed site owners produced manganese, aggregates, or gold, while the remainder produced tourmaline, amethyst, and silica (Zambia EITI & Oxfam, 2019).

1.7 Top Five Development Projects by Net Present Value

Key development projects by estimated net present value (NPV), 2000–2026 (USD billion)



Methodology note: The bar chart above shows Zambia's top five development projects (2020–2026) NPV in USD million; only base case values (most likely set of assumptions, serving as the main reference scenario) are shown. For the reported NPV, if after-tax data is not available, the pre-tax value is reported. Key development projects include those at the preliminary economic assessment, prefeasibility, full feasibility, and mine plan stages.

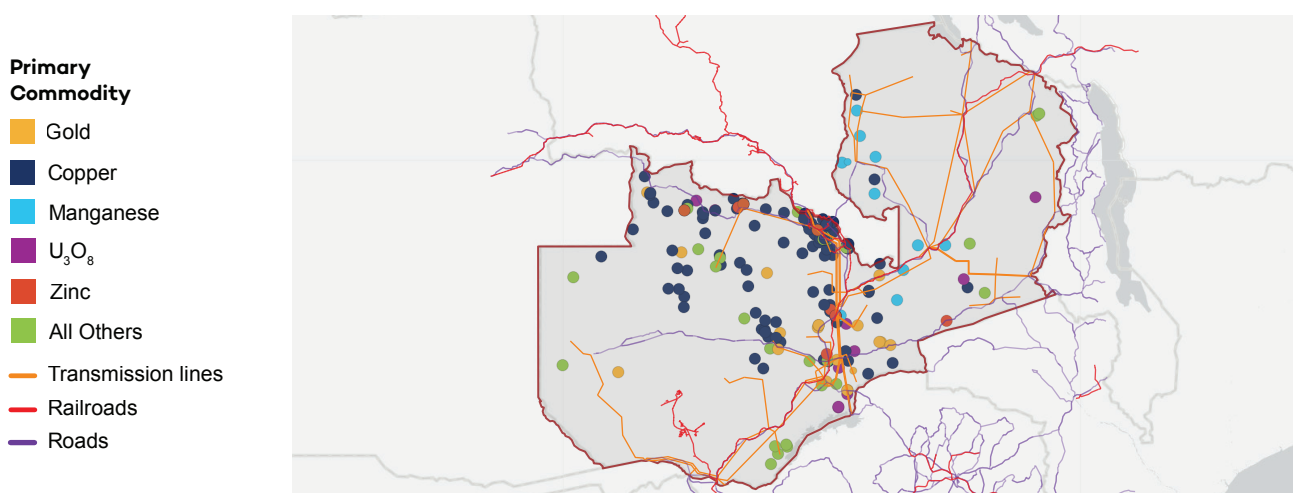
Source: S&P Global Market Intelligence, 2026a.

The chart highlights the five largest mining development projects in Zambia by estimated NPV between 2000 and 2026. First Quantum Minerals' Kansanshi project ranks well above the others, with an estimated NPV of USD 2.7 billion, followed by Vedanta Resources' Konkola project at USD 0.7 billion. The remaining projects have substantially lower reported NPVs, ranging from USD 0.1 billion to USD 0.2 billion.

2. Industrial Considerations

2.1 Mining, Infrastructure, and Energy Map

Mining, infrastructure, and energy map, 2025



Source: S&P Global Market Intelligence, 2026b; World Bank Group, 2025.

The map illustrates the spatial relationship between mining activities (circles), power transmission lines (orange), railways (red), and major roads (purple) across Zambia. The country's transport and energy infrastructure reflects both its landlocked geography and the central role of mining in the national economy. Road and rail networks connect the Copperbelt and North-Western Province to Lusaka and onward to regional export corridors serving ports in Tanzania, Mozambique, Angola, and South Africa. However, several mining areas continue to depend on secondary roads for the heavy transport of minerals, increasing logistics costs and pressure on road infrastructure.

Ongoing investments in the Lobito Corridor and the rehabilitation of the Tanzania–Zambia Railway Authority offer opportunities to diversify Zambia’s mineral export routes and shift more freight from road to rail (Invest Lobito Corridor, 2024). The Lobito Corridor could provide copper and battery-mineral projects with improved access to the Atlantic coast, while the Tanzania–Zambia Railway Authority connects Zambia to the port of Dar es Salaam on the Indian Ocean. Together, these corridors could strengthen Zambia’s resilience, regional trade connectivity, and role in critical mineral supply chains, particularly the Zambia–DRC Battery Value Chain Initiative (MoMMD, 2022).

2.2 Logistics Performance Index

(i) Logistics Performance Index (LPI), 2010 versus 2018



Methodology note: Radial chart showing the disaggregated World Bank LPI for Zambia (ranked 1 = low and 5 = high). LPI is composite measure disaggregated into six key dimensions: 1) Efficiency of the clearance process (i.e., speed, simplicity, and predictability of formalities) by border control agencies, including customs; 2) Quality of trade and transport-related infrastructure (e.g., ports, railroads, roads, information technology); 3) Ease of arranging competitively priced shipments; 4) Competence and quality of logistics services (e.g., transport operators, customs brokers); 5) Ability to track and trace consignments; 6) Timeliness of shipments in reaching destination within the scheduled or expected delivery time (World Bank, 2023).

Source: Arvis et al., 2023.

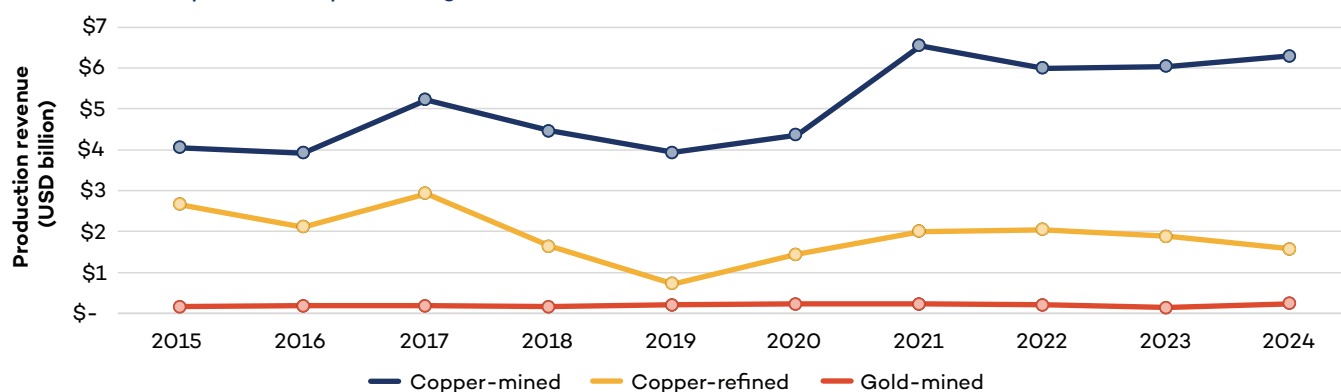
(ii) Electricity prices in Zambia, 2019–2024



Source: BloombergNEF, n.d.

2.3 Trade: Mining and refining evolution

(i) Zambia’s top revenue-producing commodities (USD billion)

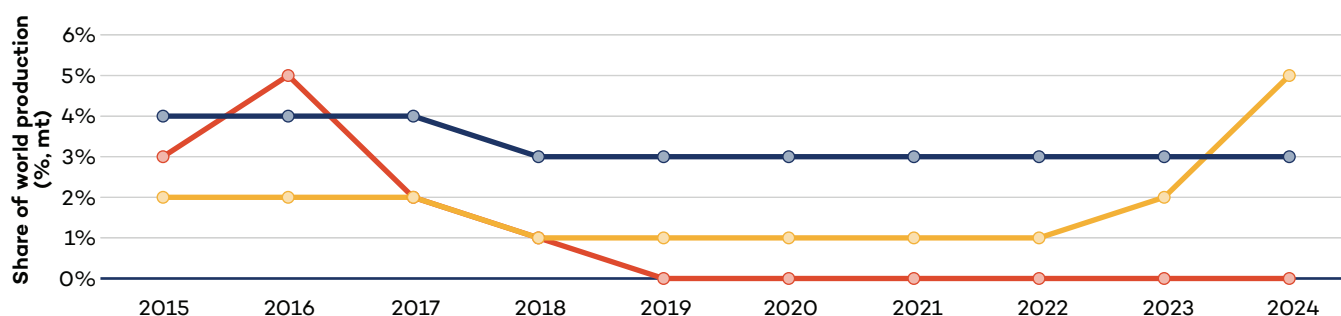


Methodology note: Figure (i) above shows the revenue generated by production of selected commodities in USD billion. This is calculated as the average annual price times annual country-level production. Figure (ii) shows the country’s share of world production for selected commodities.

Sources: U.S. Geological Survey. n.d.-a, n.d.-b.

The chart highlights the importance of copper mining revenues to Zambia’s mineral sector. By comparison, the country’s copper smelting and refining segment is less developed and more vulnerable to operational and policy-related disruptions. In 2019, higher mineral royalties, taxes on imported concentrates, and electricity shortages reduced the economic viability of some processing operations, contributing to large stockpiles of domestically produced copper concentrate. The placement of Konkola Copper Mines under provisional liquidation in the same year further constrained output. Gold mine production remained comparatively stable between 2015 and 2024, while rising gold prices increased the value of production over the period.

(ii) Global production shares by commodity (% , mt)



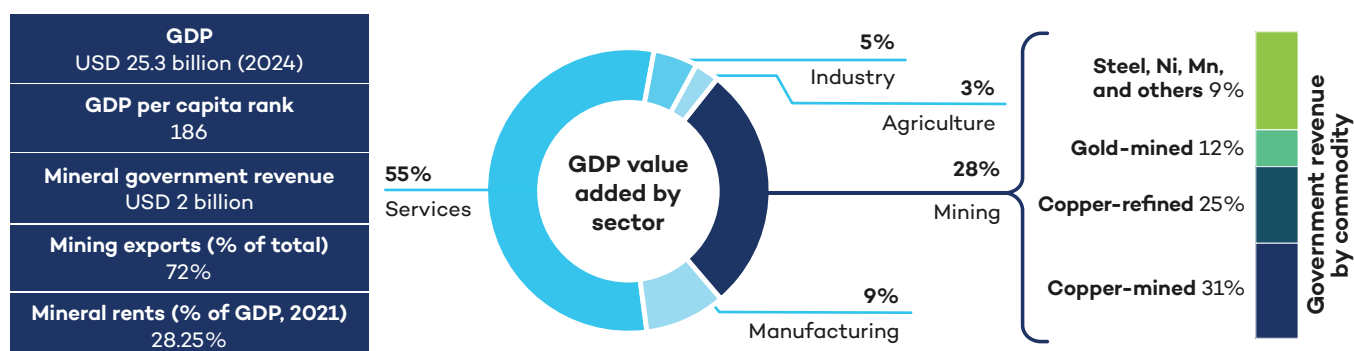
Source: U.S. Geological Survey. n.d.-a, n.d.-b.

The chart shows that Zambia maintained a relatively stable share of global copper mine production between 2015 and 2024, generally ranging from about 3% to 4%. Its share of global refined copper production was more volatile, declining to below 1% in 2019 before recovering gradually and rising sharply to more than 5% in 2024. By contrast, Zambia's share of global refined cobalt production peaked at nearly 5% in 2016, then fell rapidly and remained close to zero from 2019 onward. These trends highlight Zambia's sustained importance as a copper producer, alongside greater variability in its domestic smelting and refining performance.

3. Economic Considerations

3.1 Sectoral Contribution

Zambia GDP by sector and government revenue from mining by commodity (excluding oil and gas), 2024



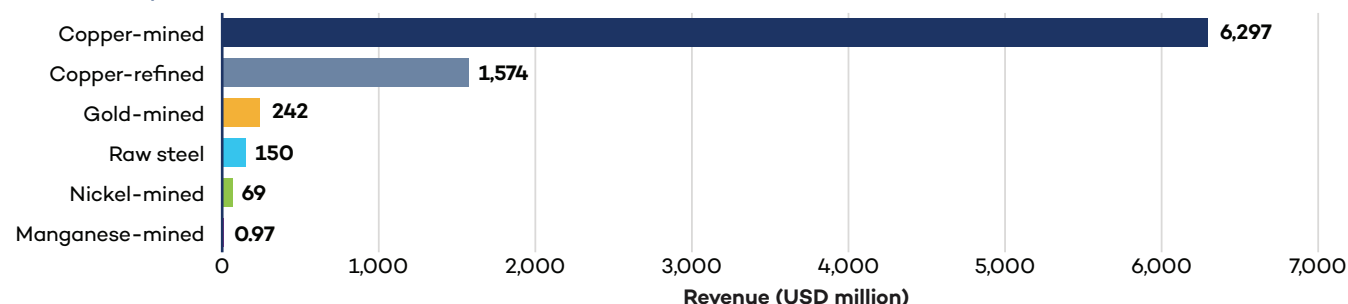
Methodology note: The data to the far left of the donut graphs covers GDP, GDP per capita world ranking, total estimated government revenues from mining, mining as a share of total exports and mineral rents. The centre donut graph presents each sector's share of GDP, with the mining sector highlighted in navy blue. The right-most figure estimates each commodity's revenue contribution to the mining sector.

Sources: EITI, 2026; World Bank Open Data, n.d.

Copper dominates Zambia's mineral production revenues through both mining and refining activities. Gold has historically been produced largely as a by-product of copper mining, although newer operations, including the Kasenseli government joint venture, target gold as their primary product. Mining contributes more than 25% of GDP, while mining products (excluding oil and gas) account for nearly 75% of total exports. The services sector now represents more than half of GDP. However, broader economic growth remains constrained by limited domestic manufacturing capacity and the continued importance of subsistence agriculture, highlighting the need for greater diversification and stronger linkages between mining and other sectors of the economy.

3.2 Mined Production Value for Selected Commodities

Estimated production value of selected commodities (USD million, 2024)



Sources: U.S. Geological Survey, n.d.-a, n.d.-b.

3.3 Trade and Export Restrictions

(i) Summary of trade and export restrictions

	Export restriction type (most restrictive)			
	Export prohibition	Export quota, tax, or tariff	Licensing requirement	No restrictions
Copper		x		
Cobalt		x		

Source: OECD, 2025.

Zambia has used taxation and mineral export permits to regulate the copper and cobalt trade and encourage domestic processing. In 2019, the government introduced a 5% import duty on copper and cobalt concentrates, aiming to promote the use of locally produced feedstock and to incentivize the use of domestic smelting capacity. However, the measure initially contributed to a decline in refined copper production because some smelters depended on blending higher-grade imported concentrates with lower-grade domestic material to operate economically.

Zambia also regulates mineral exports through a permitting system. Export permits enable the government to monitor mineral volumes and verify that applicable mineral royalties have been paid before shipments leave the country. Copper mineral royalty rates vary with market prices and generally range from 4% to 10%.

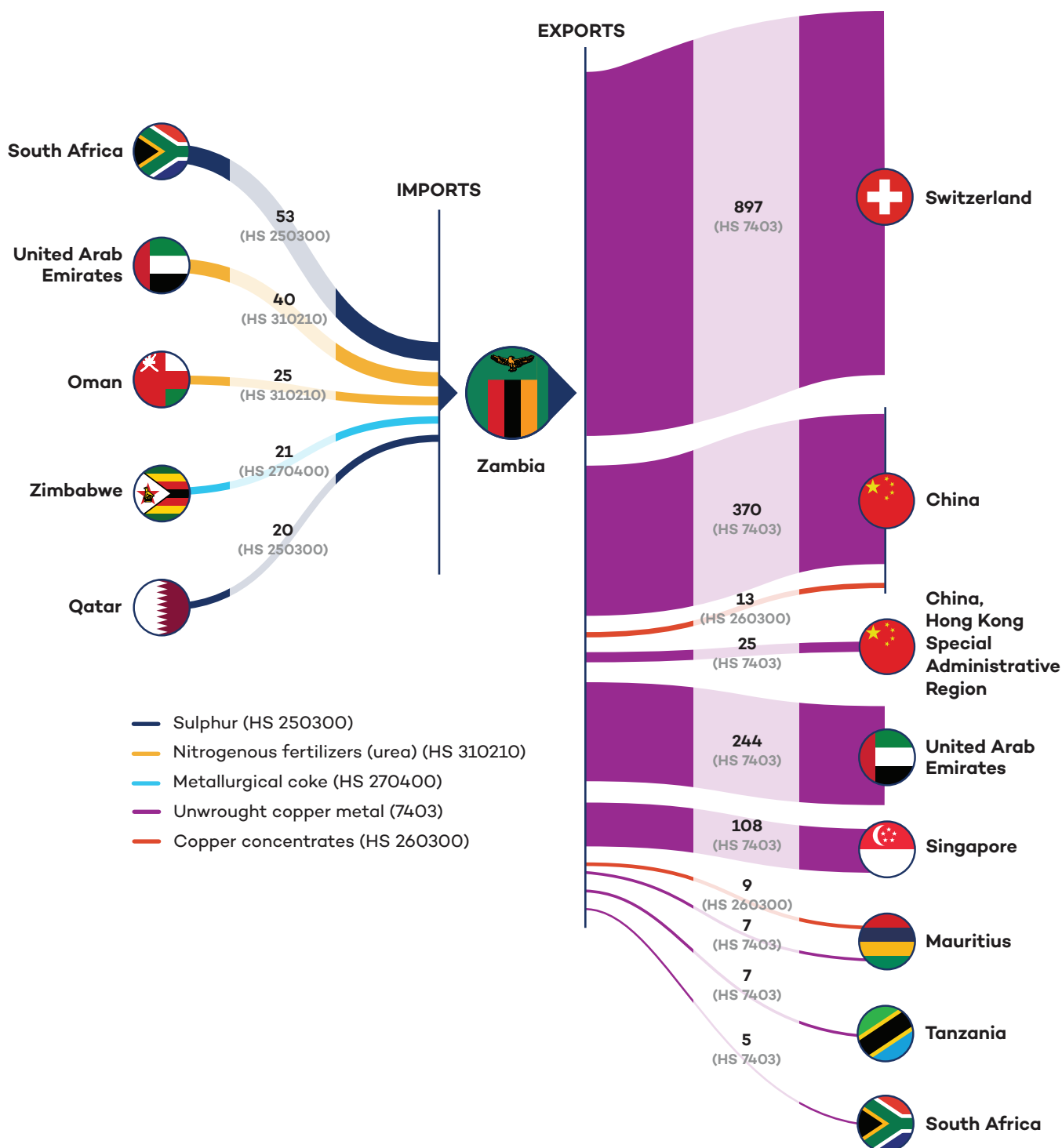
(ii) Overview of Zambian mining-related international coordination mechanisms (in force)

Partner	Year signed	Title of agreement	Type of cooperation (mining related)
China	2010–2025	Memorandums of understanding (MoUs) on Cooperation in the Mining Industry	Bilateral cooperation on mining investment, mineral development, and related infrastructure
India	2019	MoU on Cooperation in the Field of Mining and Mineral Resources	Cooperation on mining and mineral resources, including exploration, capacity building, and investment promotion
United States, Dem. Rep. Congo	2022	MoU Concerning Cooperation on the Development of Electric Vehicle Battery Value Chains	Strategic cooperation on copper and cobalt value chains, including downstream processing
Japan	2023	MoU on Cooperation in the Mining Sector	Cooperation on critical minerals, geological data, environmental, social, and governance standards, and skills development
United Kingdom	2023	MoU on Cooperation on Critical Minerals	Partnership on critical minerals and sustainable mining value chains
European Union	2023	MoU on a Strategic Partnership on Sustainable Raw Materials Value Chains	Strategic cooperation across the raw materials value chain, with emphasis on local value addition and environmental, social, and governance standards

Source: European Commission, 2023; Forum on China Africa Cooperation, 2023; Foreign, Commonwealth & Development Office, 2023; Ministry of External Affairs, 2019; Ministry of Economy, Trade and Industry, 2023; U.S. Department of State, 2023.

3.4 Major Mining Trades

Major selected mining trades (excluding oil and gas) in Zambia, 2024 (USD million)



Source: United Nations Statistics Division, 2026.

Switzerland and China are Zambia's primary export destinations. They account for over USD 6.9 billion in trade, which is dominated by copper anodes and refined unwrought copper metal. To support its industrial and agricultural activities, the country relies on regional and Middle Eastern imports for essential materials like sulfur, nitrogenous fertilizers, and metallurgical coke. Sulfur is used in copper processing, and metallurgical coke is used in the production of steel.

4. Environmental, Social, and Governance Considerations

4.1 Environmental

4.1.1 Environmental Scorecard

Environmental

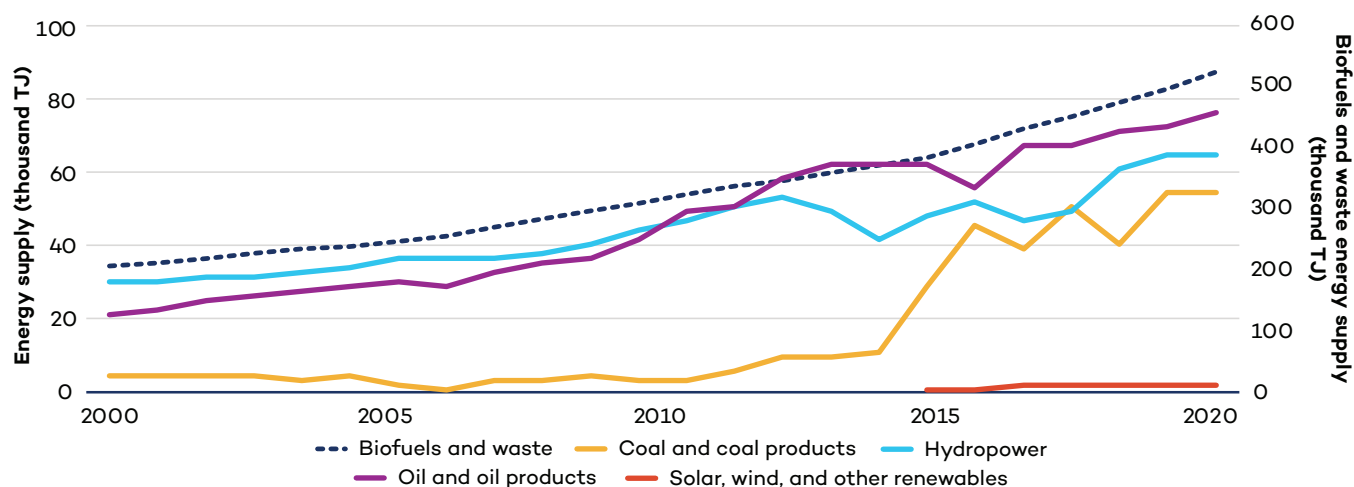
Indicator	Year	Score	% change
Total emissions^A (million mt CO ₂ e, including LULUCF*)	2000	48.35	
	2023	87.12	↑ 80.2%
Energy sector emissions^A (million mt CO ₂ e)	2000	4.91	
	2023	15.83	↑ 222.4%
Industry (IPPU**) GHG emissions^A (million mt CO ₂ e)	2000	0.244	
	2023	1.27	↑ 418.5%
Industrial energy consumption^C (terajoules, TJ)	2000	33,390	
	2023	97,903	↑ 193.2%
Modern renewables in final energy consumption^C (% share)	2000	16	
	2022	19	↑ 18.8%
Hydropower energy generation^C (% of renewable electricity generation)	2000	100	
	2023	99	↓ 1.0%
Tree cover loss^B (kilohectares [kha]/year)	2001	30	
	2024	230	↓ 666.7%

*LULUCF = land use, land-use change, and forestry; **IPPU = industrial processes and product use.

Sources: ^AClimate Watch, 2025; ^BGlobal Forest Watch, 2025; ^CIEA, 2025b.

4.1.2 Emissions and Energy Mix Overview

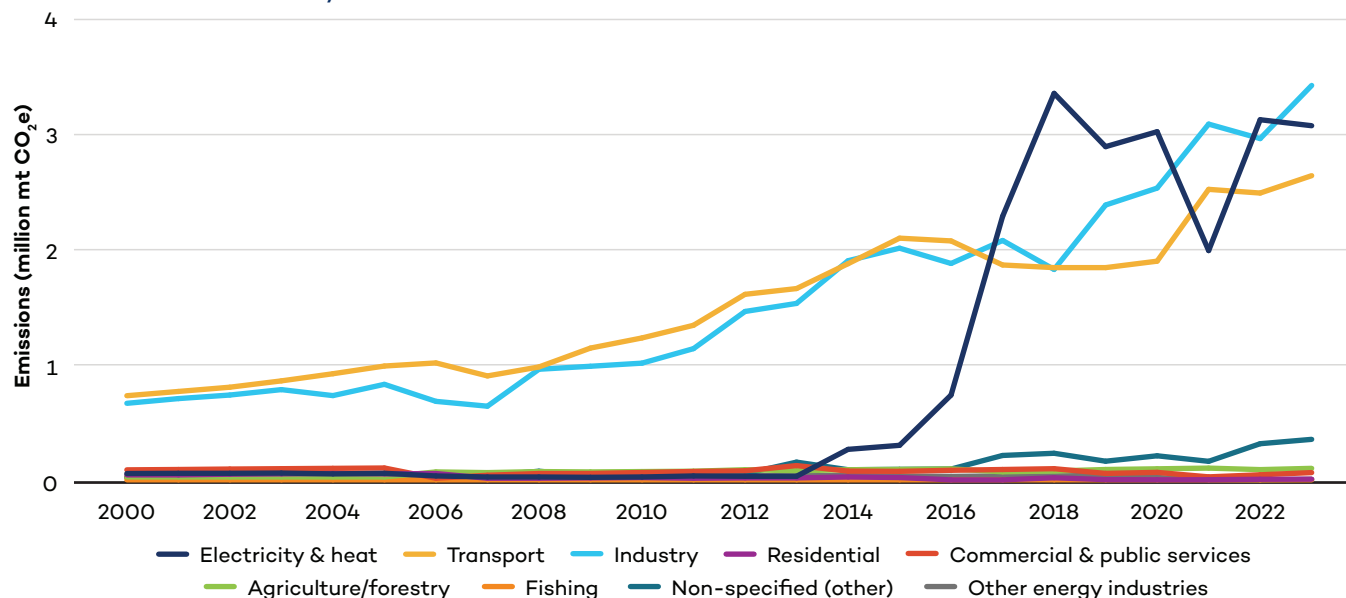
(i) Zambia's energy supply by source, 2000–2023



Source: IEA, 2025b.

Zambia's energy trends have direct implications for its mining sector, which is a key consumer of electricity given the energy-intensive nature of copper extraction and processing. Emissions from electricity and heat generation rose sharply from negligible levels in the early 2000s to a peak of 3.36 million mt CO₂e in 2018 (IEA, 2025b). This trajectory coincided with a marked increase in coal use within the total energy supply mix, with coal supply rising from 3,211 TJ in 2000 to 42,598 TJ in 2018 and 51,462 TJ in 2023 (IEA, 2025b). Hydropower supply also expanded over the period, increasing from 27,900 TJ in 2000 to 61,526 TJ in 2023, but at a slower pace than coal. As a result, hydropower accounted for a relatively modest share of total energy supply despite its growth. However, hydropower remains the backbone of Zambia's electricity system, consistently providing 80% to 90% of electricity generation between 2000 and 2023. This hydropower base provides Zambia with a comparatively low-carbon source of electricity for mining and mineral processing activities, which may support lower-carbon mineral production, offsetting the rise of coal-related emissions.

(ii) Historical emissions by sector, 2000–2023



Source: Climate Watch, 2025.

Considering sectoral emissions, industrial activity and transport are the principal sources of energy-related emissions in Zambia. Between 2000 and 2022, emissions from industry increased more than fourfold, from 0.67 million mt CO₂e to 2.97 million mt CO₂e, while transport emissions rose from 0.73 million mt CO₂e to 2.49 million mt CO₂e. Electricity and heat emissions also expanded rapidly after 2014, reaching 3.13 million mt CO₂e in 2022. Alongside these energy-related trends, emissions from IPPU have increased substantially, largely due to the manufacture of mineral products. In 2022, the mineral industry accounted for 93.8% of IPPU emissions, with lime and cement production contributing 68.6% and 31.3%, respectively, of emissions from the subsector (Government of the Republic of Zambia, 2025). Together, these trends indicate that both growth in energy consumption and the expansion of mineral processing and construction material production have been important drivers of Zambia's emissions profile.

4.2 Social

4.2.1 Social Scorecard

Social

Indicator	Year	Score
Gini coefficient^E (0–100)	2022	51.5
Prevalence of undernourishment^A (%) (3-year av.)	2024	37.7%
Total workforce in mining and quarrying^{E, F} (c)	2026	90,000 LSM 30,000 ASM
Representation of female staff in the mining workforce^B (%)	2021	LSM 9.6% ASM -30%
Resilience index^C (0–100)	2023	47

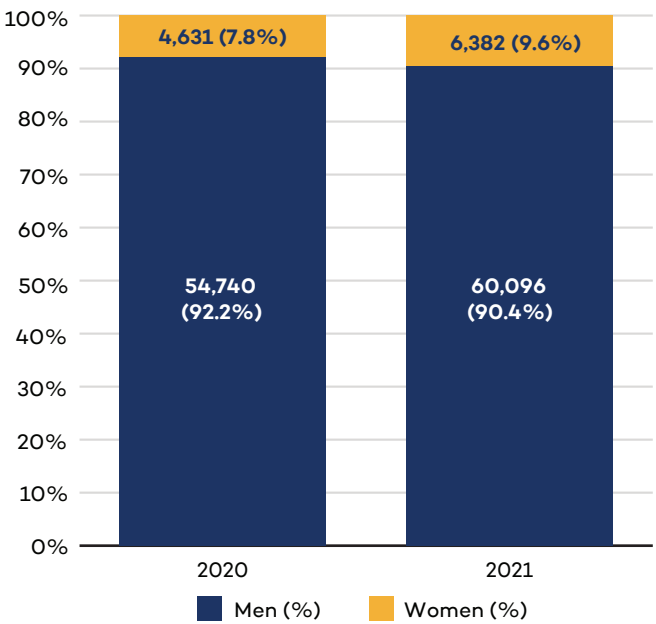
The Gini Index measures income (or consumption) inequality, ranging from 0 (perfect equality) to 100 (perfect inequality), with higher values indicating greater inequality.

Normalized score is a 0–100 country percentile ranking across all countries covered by the aggregate indicator, where 0 corresponds to the lowest rank and 100 to the highest.

Sources: ^AFood and Agriculture Organization of the United Nations, 2025; ^BCooper & Goliath, 2023; ^CLloyd's Register Foundation, 2024; ^DArtisanalmining.org, 2026; ^EWorld Bank Open Data, n.d.; ^FZambia Chamber of Mines, 2025.

4.2.2 Gender Equity and Social Inclusion

Distribution of the mining labour force by sex for 2020 and 2021



Source: Cooper & Goliath, 2023.

Traditionally male dominated, the mining sector has seen efforts to address gender inequality, though women still only made up 7.8% and 9.6% of the mining workforce in 2020 and 2021, respectively (Cooper & Goliath, 2023). Women in the sector predominantly work in support roles, such as administration, human resources, and catering, rather than technical positions. Zambia has a National Gender Policy, and the Ministry of Mines, Energy and Water Development continues to promote gender inclusivity and full participation of both women and men in mining-related activities. Nevertheless, gender-disaggregated data demonstrates that despite the presence of policies, gender-focused actions lack consistency and have thus far failed to serve as an instrument for transformative change across the entire mining industry (Cooper & Goliath, 2023).

4.3 Governance

4.3.1 Governance Scorecard

Governance		
Indicator	Year	Score
Political stability & violence ^B (0–100)	2023	52.13
Rule of law ^B (0–100)	2023	31.6
Voice & accountability ^B (0–100)	2023	45.1
Control of corruption ^B (0–100)	2023	36.79
Regulatory quality ^B (0–100)	2023	33.49
INFORM Disaster Risk Reduction Index ^A (0–10)	2026	5.5

Normalized score (0–100) indicated as a country percentile rank among all other countries covered by the aggregate indicator, with 0 corresponding to the lowest rank and 100 the highest.

INFORM Risk Index (0–10) is a composite indicator that identifies countries at risk of humanitarian crisis and disaster that would overwhelm national response capacity. 0 indicates no risk, 10 indicates extremely high risk.

Sources: ^AEuropean Commission Disaster Risk Management Knowledge Centre, 2026; ^BWorld Bank Open Data n.d.

4.3.2 Regulatory Landscape Overview

Overview of Zambia's regulatory landscape for the mining sector

Type of legal system	Common law/customary law
Main regulatory authority	Minerals Regulation Commission
Mining code or primary legislation	Minerals Regulation Commission Act, No. 14 of 2024
Legal provisions for Indigenous or local community rights	Public consultation is a legal requirement as part of the environmental impact assessment process, and the applicant is required to take all necessary measures to seek the views of the affected local communities before obtaining approval from the Zambia Environmental Management Agency. Zambia's mining legislation also requires written consent of the lawful occupiers of land on which mining activities are proposed to take place.
Environmental impact legislation	Environmental Management Act No. 12 of 2011 and Environmental Impact Assessment Regulations, Statutory Instrument No. 28 of 1997
Other relevant legislation regulating the mining industry	Citizens Economic Empowerment Act, 2006; Zambia Development Agency Act, 2006 (as amended) Water Resources Management Act, No. 21 of 2011 Roads and Traffic Control Act No. 11 of 2002; Occupational Health and Safety Act No. 36 of 2010; Urban and Regional Planning Act No. 3 of 2015

Source: Intergovernmental Forum on Mining, Minerals, Metals and Sustainable Development, 2026.

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