

IHC SECTOR INTELLIGENCE UPDATE

Nationwide Blitz Inspections Targeting Alluvial Chrome Mining Operations & Processing Plants Now Underway

The Ministry of Mines and Mining Development is enforcing a licensing rule already in the Mines and Minerals Act. Informal chrome supply from alluvial workings will tighten, and compliant, smelter-linked operators are the ones positioned to gain.

COMMODITY

Chromite (Chrome Ore)

FOCUS MARKET

Zimbabwe

DEVELOPMENT

Enforcement Blitz

SECTION 01

What Has happened

On 25 September 2026 the Ministry began nationwide blitz inspections of alluvial chrome mining operations and processing plants. A press statement dated 30 September 2026, issued by Secretary for Mines and Mining Development Dr T. U. Wushe, announced the exercise.



Phase one covers Mashonaland Central, Mashonaland West and the Midlands, the provinces through which the Great Dyke runs, before extending nationwide. Non-compliant operations face suspension and penalties, and the processing plants that buy the ore are inspected too.

A separate public notice dated 2 October 2026, reported by the press, gives rights holders with outstanding statutory obligations until 31 December 2026 to regularise or risk forfeiture, extending an earlier 30 August deadline.

DATA PROVENANCE

Ministry of Mines and Mining Development, press statement, 30 September 2026 (stamped received 2 October 2026). Mining Zimbabwe, 7 October 2026. 263Chat, 5 October 2026. The Herald via Zimbabwe Situation, 6 October 2026. Shanghai Metals Market (SMM) reporting of Minerals Marketing Corporation of Zimbabwe (MMCZ) data, 31 July, 5 August and 8 October 2026, not the MMCZ releases themselves. Equity Axis, 28 March 2026. USGS Mineral Commodity Summaries 2026, chromium chapter.

SECTION 02

The Legal Basis

Nothing in the law has changed. What has changed is enforcement.

PROVISION	EFFECT
Mines and Minerals Act [Chapter 21:05], Section 222	Designates chromite as a designated mineral.
Section 225	No person may work an alluvial or eluvial chromite deposit without an order of the Mining Affairs Board.
Ministry Enforcement, from 25 September 2026	Suspension and penalties for non-compliant operations. Processing plants inspected for compliance.
Public Notice, 2 October 2026	Rights holders must settle statutory obligations or agree a payment plan, and secure surveyed coordinates, by 31 December 2026, or face forfeiture.

Table 1: Legal and administrative framework for the blitz.

Holding mineral-bearing ground is not a licence to work alluvial chrome. Only a Mining Affairs Board order is.

SECTION 03

Zimbabwe In The Chrome Market

Zimbabwe is a mid-sized chromite producer with an outsized resource. USGS puts its 2025 output at 2 000 000 tonnes, about 3.9% of world production, against reserves of 140 000 000 tonnes, the third largest after South Africa and Kazakhstan. The resource sits on the Great Dyke, which runs about 550 km through the country.

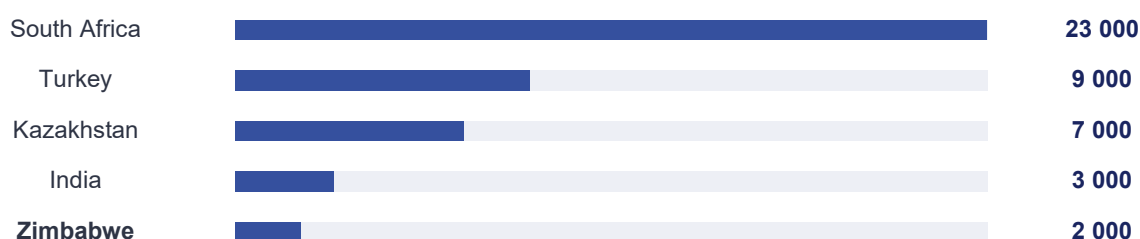


Figure 1: Chromite ore production, 2025 estimate, thousand tonnes. World total 51 000.

Sources: USGS Mineral Commodity Summaries 2026, chromium chapter.

Policy is pushing the country from ore towards alloy. A February 2026 tightening of raw mineral export restrictions covers chrome, and in August 2026 the Ministry earmarked chrome-producing districts as ferrochrome hubs, with chrome titles above 100 hectares to be tied to furnace development. The 15 September 2026 statement that single-mineral mines will no longer be approved points the same way.

HIGH-CARBON FERROCHROME EXPORTS	JAN TO SEP 2024	JAN TO SEP 2025	CHANGE
Volume, tonnes	271 150	328 442	+21%
Value, US\$ million	251.6	272.8	+8%
Implied Value, US\$ per tonne	928	831	-10.5%

Table 2: Ferrochrome exports rose in volume faster than in value. Implied unit value is an IHC derivation.

Sources: Equity Axis, 28 March 2026, citing export data.

Chrome and ferrochrome together earned about US\$221.8M in the first half of 2026, roughly 8.8% of the US\$2.532B MMCZ-marketed mineral exports in that period. MMCZ expects Chinese smelter restocking to support chrome ore demand in the fourth quarter, while ferrochrome buying remains cautious.

SECTION 04

Investment Implications

- **Supply:** Alluvial workings feed independent processing plants and, through them, smelters. A cut in informal ore volumes from the three phase one provinces in the fourth quarter is likely, just as MMCZ expects Chinese restocking to lift demand.
- **Due Diligence:** Any chrome opportunity should now evidence a Mining Affairs Board order for alluvial or eluvial ground, current statutory payments and surveyed coordinates. Title alone is no longer sufficient comfort.
- **Offtake Risk:** Processing plants that bought from unlicensed alluvial sources face inspection. Investors in plants, or buyers of their concentrate, carry that supply-chain exposure.
- **Consolidation:** Operators who cannot regularize by 31 December 2026 risk forfeiture. Ground may return to the market, creating acquisition and joint venture openings for compliant, capitalised entrants.
- **Direction Of Policy:** Enforcement, export restrictions, ferrochrome hubs and the multi-mineral approval test all reward integrated ore-to-alloy projects and penalise stand-alone ore trading.

CORE INVESTMENT IMPLICATIONS

The bankable chrome case in Zimbabwe is now a licensed, smelter-linked one. Opportunity owners with alluvial chrome ground should secure a Mining Affairs Board order and regularize before 31 December 2026. This is now a gating item before any opportunity is presented to investors.

SECTION 05

Key Takeaways

- 1 Nationwide blitz inspections of alluvial chrome mining and processing plants began on 25 September 2026.
- 2 The legal basis is existing law: sections 222 and 225 of the Mines and Minerals Act require a Mining Affairs Board order to work alluvial or eluvial chromite.
- 3 Rights holders have until 31 December 2026 to regularize statutory obligations or risk forfeiture.
- 4 Zimbabwe produced an estimated 2 000 000 tonnes of chromite in 2025 and holds 140 000 000 tonnes of reserves.
- 5 Compliant, integrated ore-to-ferrochrome projects are the investable form of the sector.

SECTION 06

About Investor Hosting Centre

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