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EDITOR'S NOTE

> *This edition turns west, to the Sahel and West Africa. Its common thread is simple: resources have become the real currency of power.*

Last month I called it the "Great Red Sea War": the renewed conflict in Tigray and the looming confrontation between Ethiopia and Eritrea, along with the ongoing wars in Sudan and Yemen, at the heart of the Horn of Africa and the wider Red Sea. Events have since moved faster than anyone expected, including, I suspect, the Ethiopian National Defense Force itself, which retook every key city and road in Tigray in under two weeks. Guerrilla warfare is not yet over. As we anticipated, the diplomatic clash between Addis Ababa and Asmara has sharpened. Ethiopia now accuses Eritrea of invading its territory and then retreating under fire, and has shifted its narrative from access to the sea to one of defending its sovereignty against a destabilising neighbour. Med-Or is preparing a full report on this great war in the Red Sea and its geoeconomic stakes.

This edition turns west, to the Sahel and West Africa. Its common thread is simple: resources have become the real currency of power. Dr Federico Pontoni captures it in one line I wish I had written: leaving a regional organisation is far easier than leaving a regional energy system. Mali, Burkina Faso and Niger have walked out of ECOWAS, yet their lights still depend on Ghana, Côte d'Ivoire and Nigeria. The juntas sold their exit as independence; in practice, they are only recalibrating their external reliance. Algeria and Morocco have understood this, and are bidding for the Sahel with turbines, rival gas pipelines and now soldiers.

Francesco Meriano shows how a Russian-brokered rapprochement between Algiers and the juntas helped Mali retake Kidal and Algeria water down Moroccan influence. Their mounting competition will likely affect political, security and – critically for Europe – energy cooperation across West Africa. As high energy costs bite European societies and economies, the stakes for Europe, and for Italy, are concrete: West African gas will reach the Mediterranean either through Tangier, in Morocco, or through Hassi R'Mel, in Algeria. Both routes lead back to Nigeria, where, as Luciano Pollichieni shows, fuel prices, oil theft in the Niger Delta and an $8 billion pipeline security bill dominate the upcoming presidential race.

Gold tells the same story. Matilde Vecchioni shows West African states racing to build refineries rather than ship raw gold to foreign markets. But they compete for the same ore, capacity far outstrips output, and no refinery yet meets the standards international buyers demand. In my view, the real test lies upstream: moving from artisanal to industrial mining, formalising miners, too many of them under the control of armed groups, tackling corruption and making their gold traceable. Here I have a message for European development agenda: do not steer clear of this sector, instead double down on the pilot projects already funded and, wherever possible, go to scale. Millions of exploited artisanal miners, and the families who rely on them, depend on it.

Ports complete the picture. Corrado Čok, pen-holder of our monthly reports, to whom I owe special thanks, shows how disruption in Hormuz and Bab el-Mandeb has turned Tanger Med, Lomé and Lamu into relay points between Asia and Europe. Money is pouring in, but congestion, weak road and rail links still hold many ports back. The prize is to make them industrial platforms, not mere conduits for raw commodities. On 28 October, we took this debate to Nairobi, where Med-Or and IGAD held a joint seminar at our Africa headquarters, bringing officials, diplomats and business leaders around one table.

We close on a hopeful note. John Seroney, whose father planted coffee in Kericho in 1978, shipped his first consignment of Kenyan green coffee to Trieste (Italy) this July. His lesson sums up this edition: value stays in Africa when quality, traceability and processing stay there too. Italy can be a partner in making that happen.

Umberto Tavolato
Executive Director,
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UPDATES

NORTH AFRICA

ALGERIA

Algeria to dispatch troops to Niger

The Algerian upper house approved a resolution to send ground troops to Niger in order to protect Algerian assets (such as oil facilities run by State-owned company Sonatrach) in the country. The resolution, which has been facilitated by a constitutional amendment introduced last March, may mark Algeria's first foreign deployment in over 50 years as well as a historic break in its non-intervention doctrine. As jihadist insurrections gain ground in the Sahel, Algeria is reinforcing strained ties with the region in a bid to shore up its southern borders.

MOROCCO

New government takes office in Rabat

Held on October 3rd, elections in Morocco saw the incumbent National Rally of Independents (RNI) lose primacy in favour of its former junior ally, the centre-right Party for Authenticity and Modernity (PAM). Fatima Ezzahra El Mansouri, a former mayor of Marrakech, was appointed prime minister, while the influential president of Morocco's football federation, Fouzi Lekjaa, gained the Economy ministry after running on the PAM ticket. The Islamist opposition also regained ground with the return of its old leader, Abdelilah Benkirane. The new government will likely pursue institutional continuity and seek to encourage industrial and trade growth while defusing social tensions.

MOROCCO

Western Sahara mediation suffers setbacks

The US-backed mediation over the fate of Western Sahara may be grinding to a stalemate. In an initially auspicious start, Washington had managed to bring Morocco and the Sahrawi militia of the Polisario front back to the negotiating table, with Mauritania and Algeria (which remains the Polisario's chief backer) rejoining talks as observers. After three meetings in Washington and Madrid failed to produce an agreement between Moroccan and Sahrawi claims, the Polisario launched a rocket attack on the frontier town of Es-Smara which further exacerbated tensions. Trump's advisor Massad Boulos stated that he remains optimistic but sees no agreement on the horizon.

WEST AFRICA AND THE SAHEL

CHAD

Paris and N'Djamena rebuild defence ties

On October 13th, Chad and France signed a defence declaration of intent in Paris, almost two years after Chad ended its military pact. Cooperation, however, had quietly resumed this year. Focusing on training, expertise, industry and technology, the document fits within a French shift away from permanent bases toward smaller, interest-based and partner-led arrangements. This move somewhat contrasts the regional trend, which saw the Malian, Burkinabe and Nigerien juntas distancing themselves from France and strengthening ties with Russia.

ECOWAS

ECOWAS and the Sahel block reopen talks

On October 17th in Dakar, ECOWAS and the Alliance of Sahel States (AES) held their first ministerial-level talks since the AES exit. They agreed on joint working groups covering 18 priority areas, including trade, cross-border security and the movement of people and goods. Mali, Burkina Faso and Niger maintain that their withdrawal is irreversible. With cross-border threats on the rise, tense relations between Nigeria and the AES countries risk weakening intelligence-sharing and joint counterterrorism operations. The aim is therefore to manage the split in favour of regional cooperation. How ECOWAS will navigate its diplomatic engagement with junta-led countries will

MALI

Kidal returns to Bamako's hands, while war continues in the North

Malian troops and Russia's Africa Corps re-entered Kidal on October 6th, five months after separatist rebels seized it. The Azawad Liberation Front (FLA) said it had withdrawn rather than fight, and it describes the move as temporary. The change of control is a very symbolic victory for the central government, while not necessarily a decisive one, especially considering its distance from the capital: holding it, and keeping supply lines open, will now be the harder task.

EAST AFRICA AND THE HORN

ETHIOPIA

Russia delivers warplanes and air defence systems to Ethiopia

Ethiopia has received 12 Russian Su-35 fighter jets, a year ahead of schedule, Prime Minister Abiy Ahmed announced during the Russia-Africa summit in Moscow, thanking President Vladimir Putin. Russian exporter Rosoboronexport, however, said only two were handed over. Ethiopia will also receive four S-400 air defence batteries from Russia. The move relaunches Russia's role as a military partner in Africa after the setbacks suffered in the Sahel. The deliveries come amid ongoing fighting in Tigray and increase the risk of an escalation with Eritrea. In the Red Sea, Russia strives to maintain its great power relevance and secure a naval base through diplomatic and military support.

SOMALIA

Growing pressure from South West state opposition

As part of the month-long dispute with the Federal Government of Somalia (FGS) over control of the state government, South West forces loyal to ousted president, Abdiaziz Laftagareen, seized five key towns. Egypt and Türkiye are accused of supporting the FGS in the dispute, while the UAE is accused of funnelling financial support to Laftagareen's forces. The offensive could renew tensions between Addis Ababa and Mogadishu due to Ethiopia's position in South West State, and Somalia's cooperation with Ethiopia's regional rivals (e.g. Egypt, Eritrea, and Sudan).

SOUTH SUDAN

South Sudan plans for elections amid ongoing war

South Sudan is preparing for its first-ever elections - postponed since the country's independence in 2011. Observers believe the conditions for free, fair and credible elections are still missing. There is no voter registration database, no census has been conducted, and the opposition continues to be suppressed, suggesting that President Kiir could easily secure a new mandate. Meanwhile, one year into the collapse of the country's fragile peace agreement, fighting between government and opposition (SPLM-IO) forces continues, worsening an already dire humanitarian emergency.

KENYA

Kenya juggles to contain an Ebola outbreak

As of October 28th, Ebola cases in Kenya rose to nine after several relatives of an infected man travelling from Uganda and three medical staff who assisted him tested positive for the virus. Two people have died of the virus so far. However, this remains the only Ebola cluster to have emerged in Kenya and contacts remain in quarantine. Meantime, the country strengthened screening measures at border points and established an emergency hotline to keep the situation under control with no community transmission yet.

CENTRAL-SOUTHERN AFRICA & THE GREAT LAKES

DEMOCRATIC REPUBLIC OF CONGO

Joseph Kabila hatches an anti-Tshisekedi coalition

On October 12th, former DRC president Joseph Kabila launched the Front pour la Refondation de la Nation (FRN), a political-military coalition vowing to depose President Félix Tshisekedi. The FRN largely rebrands the M23/AFC without adding other significant players: Kabila's deputies are current M23/AFC leaders. His presence nonetheless gives the Rwanda-backed insurgency a prominent Congolese face, helping it pose as a national movement. Moreover, Kabila's leadership could temper mounting tensions that emerged within the M23/AFC in recent months. Kabila who was sentenced to death in absentia for treason, accuses the government of misrule.

MAURITIUS

The first African credit agency is born

The African Union launched the Africa Credit Rating Agency (AfCRA), the continent's first, on October 7th. Headquartered in Mauritius and nearly a decade in development, the privately driven, self-funded agency operates under the African Peer Review Mechanism. It aims to lower borrowing costs by assessing governments and companies using African data and context, complementing rather than replacing Fitch, Moody's and S&P. AfCRA seeks to address concerns over major agencies' perceived bias in risk assessments and will cover 23 African economies currently unrated by them.

MAURITIUS

Mauritius rocked by violent protests

Protests broke out across Mauritius on October 7th over water shortages caused by drought and rising living costs fuelled by soaring fuel prices linked to the Middle East war. After police shot and seriously injured a young woman on October 9th, unrest escalated into the island's worst riots since 1999, with police stations torched, shops looted and seven officers injured, though no deaths were reported. The government deployed the paramilitary Special Mobile Force, imposed curfews, closed schools and arrested at least 188 people before lifting the curfew on October 19th.

MOZAMBIQUE

The EU renews military assistance to Mozambique

The European Union has extended its Military Assistance Mission in Mozambique (EUMAM MOZ) for two more years, a decision welcomed this week by President Daniel Chapo. Led by Portugal, the non-combat mission advises and trains the quick reaction forces fighting an extremist insurgency in Cabo Delgado. Since 2024 it has run over 40 programmes involving about 1,200 soldiers. The renewal matters for TotalEnergies' restarted LNG project in Mozambique's Rovuma basin. Meanwhile, the EU has ended funding for Rwanda's troops in the province, which could complicate efforts at containing the jihadist insurgency.

ESSAYS

Leaving ECOWAS, staying on the grid

Leaving a regional organisation is far easier than leaving a regional energy system.

BY: FEDERICO PONTONI

On October 25th, Algeria's parliament authorised the deployment of troops to Niger to protect energy installations, starting with those operated by Sonatrach. It will be the first time Algerian soldiers have served abroad since 1973. The detail is telling. In the Sahel, energy has become the hardest currency of influence, and the three members of the Alliance of Sahel States (AES), Burkina Faso, Mali and Niger, are discovering that leaving a regional organisation is far easier than leaving a regional energy system.

Three points explain why. First, the AES has left ECOWAS but not the grid that its neighbours run, and it still depends on them for its power. Second, the body that governs that grid, the West African Power Pool (WAPP), is not the same thing as ECOWAS, and that gap is where a compromise could sit. Third, North Africa has read the situation: Algeria and Morocco are competing for influence in the Sahel with turbines, pipelines and now soldiers.

The first point is that the AES left ECOWAS on paper, not on the grid. Almost two years after the three formally left in January 2025, their power systems look much as they did before: small, thermal-heavy and dependent on their neighbours. Burkina Faso imports from Ghana and Côte d'Ivoire, Mali from Côte d'Ivoire, and Niger from Nigeria, which covered around 70% of Nigerien consumption before the 2023 coup. That line was cut after the coup and reconnected in March 2024, but by spring 2025 Nigeria was delivering only 46 MW instead of the usual 80. This summer, Niger was at times drawing almost twice that level. What the three generate at home runs largely on imported diesel and fuel oil, which makes every light switch hostage to the security of the supply corridors.

Mali is the extreme case. Since September 2025, the JNIM fuel blockade has turned tanker convoys into military operations. Early this year Bamako was receiving six to eight hours of electricity a day; in May some districts faced eighteen-hour cuts, and Mopti had already spent a month with no power at all. Niger is better placed but structurally short: Niamey alone needs around 200 MW, while in the north Agadez, Arlit and Tchirozérine require some 26 MW against 3.8 MW of available thermal capacity. Politically divorced, the AES has therefore never really left the regional grid. Its utilities (SONABEL, EDM and NIGELEC) remain connected and keep trading through it. In some weeks this summer, the three accounted for roughly half of all the electricity traded across WAPP borders. Burkina Faso and Niger are, moreover, among the region's most punctual payers: in the second quarter of 2026, NIGELEC settled its Nigerian invoice in full, while Benin and Togo, still inside ECOWAS, left most of theirs unpaid.

The second point is that WAPP and ECOWAS are not the same thing, and the difference matters now. The regional market is entering its most delicate phase. Around 8% of West African electricity now crosses a border, regulators validated Day-Ahead Market tariffs in late 2025, WAPP signed its agreement with a market clearing bank in July, and the launch of the Day-Ahead Market is expected early next year. The 330 kV North Core line, running from Birnin Kebbi through Niamey to Ouagadougou, would make Nigeria the Sahel's natural supplier. The obstacle is institutional, not physical. WAPP is a specialised ECOWAS institution, and the market's rules, tariffs and dispute settlement fall under ERERA, the ECOWAS regulator.

Yet the Pool's membership has never coincided with ECOWAS. Mauritania's SOMELEC and SOGEM, which runs the Manantali dam, are members, and so is Morocco's ONEE, while the planned Morocco–Mauritania interconnection is explicitly meant to link Europe to the WAPP system. The logic therefore points to a market that is West African rather than ECOWAS-only: rules that utilities can join without their governments sitting at the ECOWAS table. For the AES it would be a door left open; for Rabat, a way in. Dakar may provide the political frame. On October 17th, the first ministerial session of the ECOWAS–AES dialogue closed with an eight-point joint communiqué, signed by Senegal and Burkina Faso. It set up joint thematic working groups to prepare a Cooperation Framework Agreement, with findings to go back to ministers before a next session whose date and venue are still to be agreed. The text names no sectors, energy included, and both sides described the exercise as a reset rather than a return. Electricity may be the most concrete test of what such coexistence can mean.

The third and most central point is that North Africa has read the situation well, and each of the Sahel's two northern neighbours is backing its own pipeline. In Freetown on July 19th, ECOWAS heads of state signed the intergovernmental agreement for the Nigeria–Morocco African Atlantic Gas Pipeline: roughly 6,000 km across 13 countries, 30 bcm a year, half of it earmarked for Morocco and Europe, at an estimated $25 billion. Six weeks earlier, on June 4th, Algeria broke ground at Aoulef on its 1,210 km section of the Trans-Saharan Gas Pipeline; Niger's section is due to start in early 2027, financed and built by Sonatrach. The geography matters more than the volumes. The Atlantic pipeline hugs the coast and runs through ECOWAS, so it ties Rabat to the bloc the Sahel left. The Trans-Saharan crosses Niger, so it ties Algiers (and Abuja) to the bloc that left. Rabat hedges on the other side with its Atlantic Initiative, offering the landlocked AES access to the ocean through Moroccan ports, an offer Bamako reaffirmed in July. Both projects compete for the same Nigerian gas and largely the same European buyers, and it is far from obvious that the region and its lenders can fund both.

Algeria, however, is not waiting for the gas. Relations with Niamey, frozen after the 2025 drone incident with Mali, were repaired this year, and electricity has been the first currency of reconciliation. In June the two prime ministers inaugurated the "solidarity" power plant at Gorou Banda: 40 MW of gas turbines donated by Algeria and built in about 70 days by the newly created Sonelgaz International, with equipment flown in by air bridge. Sonelgaz is also studying the rehabilitation of Niamey's transmission and distribution networks and of the Niamey–Agadez axis, while in September Algeria's energy minister reviewed a package for Agadez: new networks, a mobile turbine and a solar plant. Agadez is not a random choice. It is the electrical periphery of Niger, the gateway to the uranium of Arlit, and the region the Trans-Saharan pipeline will cross on its way north. Lighting it up is development aid; it is also the logic of a future pipeline operator securing its route.

Taken together, the three points describe a paradox. Sovereignty, proclaimed as an exit, is being practised as a choice of dependencies. What the AES can do is choose its patrons, and its northern neighbours are bidding with turbines, pipes and now, soldiers. For Europe, and for Italy, the outcome is not academic: whichever pipeline gets built will decide whether West African gas reaches the Mediterranean through Tangier or through Hassi R'Mel.

Algeria's return shifts sahelian Alliances

Whatever the future holds, North African and Sahelian dynamics are becoming deeply entangled, as conflicts across the Sahara take an increasingly regional shape.

BY: FRANCESCO MERIANO

In early October, the Malian armed forces and their Africa Corps operatives recaptured the northern town of Kidal from the Tuareg fighters of the Azawad Liberation Front (FLA), who retreated after several days' bombardment from Russian aircraft. The retaking of Kidal – capital of northern Mali and a highly symbolic Tuareg stronghold – is a much-needed boon for Assimi Goïta's embattled junta, which had lost the town in April after the FLA and its jihadist JNIM allies had advanced deep into Mali. Bamako itself has been under blockade for much of the year.

This change of fortunes may depend at least partly on Algeria's changing stance. Algeria's relations with Mali had soured since the establishment of the Alliance of Sahel States (AES) in 2023, with Bamako rescinding the Algeria-backed peace accords with the Tuaregs and accusing Algiers of covertly supporting FLA activities. The two countries also recalled their ambassadors after Algeria shot down a Malian army drone near the Algeria-Mali border. The near severing of relations also weakened border security and allowed the FLA to turn the Malian border town of Tinzaouatine into a key base for the rebellion.

However, the need to safeguard its vast southern borders with Niger and Mali is now pushing Algiers to mend ties with the AES. In August it sent combat aircraft to Niamey to prop up Abdourahamane Tiani's junta after a coup attempt. This month it secured a rare parliamentary approval to send ground troops to defend Algerian assets in Niger. Meanwhile, Algerian prime minister Safi Ghreib flew to Bamako for a "friendship" meeting in September. This rapprochement was facilitated by Russia, as its Africa Corps are struggling to uphold Moscow's security partnerships against Sahelian insurgents. Tellingly, Russo-Malian UAVs were also able to hit Tinzaouatine without any stirring from the Algerian side of the border.

By breaking its historical non-intervention policy, Algeria also aims to curtail Morocco's growing influence over the Sahel. In 2024, Rabat had exploited Algeria's quarrels with the AES to promote an ambitious trade corridor – also known as the Atlantic Initiative – to link the landlocked Sahel States with the Western Saharan port of Dakhla. Much to Algeria's chagrin, this move also secured AES backing for a Moroccan Western Sahara. As the security situation deteriorates, however, Morocco may find those commitments increasingly hard to put into practice.

Algeria's bid to patch ties with the AES may also have prompted FLA leaders to travel to Benghazi in early October, to seek a remedial alliance with the Haftar clan in eastern Libya (Algeria, by contrast, supports the western Libyan government in Tripoli). However, nothing came out of the attempt, as the Haftars themselves have strong ties to the AES. In the meantime, Algeria is reportedly using its contacts to pressure FLA leadership into loosening the blockade on Bamako, a proposal that may jeopardise the Tuareg alliance with JNIM and cause friction with hard liners in both groups. Whatever the future holds, North African and Sahelian dynamics are becoming deeply entangled, as conflicts across the Sahara take an increasingly regional shape.

Subsidies and revenues: Nigeria's Presidential campaign kicks off

Oil revenues and infrastructure have easily become one of the key issues of the electoral campaign.

BY: LUCIANO POLLICHIENI

Confronting a severe cost-of-living crisis, the Nigerian federal government has unveiled an emergency energy relief package, introducing a thirty-day discounted fuel dispensation through the state-owned Nigerian National Petroleum Company Limited (NNPC) and a proposed price-modulation ceiling of 1,350 naira per litre. Finance Minister Taiwo Oyedele has presented these measures as targeted consumer buffers designed to bypass the fiscally ruinous universal subsidies formally abolished by President Bola Tinubu in 2023.

However, this strategic pivot coincides with intense public debate triggered by NNPC's disclosure that it spent $8 billion on pipeline and infrastructure surveillance in 2025, marking a 26 percent year-on-year surge. Opposition candidates across an increasingly crowded political field, notably Atiku Abubakar and Peter Obi, have used such news to challenge the administration's fiscal credibility.

Oil revenues and infrastructure have easily become one of the key issues of the electoral campaign. The sprawling field pits incumbent President Bola Ahmed Tinubu and his market-stabilization agenda against entrenched political veterans like Atiku Abubakar and austerity advocates such as Peter Obi, alongside younger technocrats and ideological reformers. This crowded race transcends conventional partisan manoeuvring, representing a political friction of generational demands and competing macroeconomic philosophies ranging from privatization to protectionism.

Historically, informal cross-border arbitrage in subsidized Nigerian refined petroleum has anchored transport and retail logistics in neighbouring Benin, Togo, Niger, and Cameroon. Yet, in the current geopolitical scenario, these oscillations between strict market deregulation and discretionary price modulation might affect these transnational fuel corridors, exporting inflation and unpredictability into neighbouring economies that lack comparable fiscal shock buffers. Concurrently, NNPC's staggering $8 billion security outlay highlights the persistent instability in the Niger Delta region where oil theft and network disruptions have siphoned off an estimated $300 billion in recent years.

Needless to say, both the presidential election and the issues related to the Nigerian oil industry will have effects far beyond West Africa. Nigeria's efficiency in energy governance carries profound geostrategic implications for international markets striving to secure diversified hydrocarbon supply chains amid Middle Eastern instability. While notable upstream capital deployments - such as TotalEnergies' recent $800 million offshore gas final investment decision - reaffirm Nigeria's enduring strategic centrality for European energy security, the systemic operational hazard of absorbing multi-billion-dollar surveillance overheads might represent a punitive premium on foreign direct investment. Non-Western actors, particularly Chinese state-owned enterprises and Gulf sovereign wealth funds possessing higher institutional tolerance for non-commercial risks, are well-positioned to exploit any Western divestment.

Ultimately, Nigeria's electoral trajectory will serve as a bellwether. Rather than facing a stark binary between pure market-anchored reforms and extraction regimes, the next administration will likely have to navigate a complex hybrid approach. The winner must balance the urgent need to consolidate institutional transparency - vital for remaining a viable pillar in the global energy transition - with the pragmatic reality of deploying state-driven interventions to protect critical infrastructure in a highly volatile environment.

From mines to refineries: West Africa's ambition for the gold value chain

The value of West Africa's gold will be ultimately decided in and by those countries which will be able to keep their refineries running and produce commercially trusted gold.

BY: MATILDE VECCHIONI

Who profits when gold leaves Africa? For decades, the answer was rarely the countries that mined it. Although Africa remains one of the world's gold-richest regions, it still occupies the lower end of the global value chain: most of its gold has long left as raw material, to be refined, certified and sold elsewhere, chiefly to the Gulf. West African countries now appear determined to bring more of that business home. Ghana barred exports of unrefined gold from 1 September. Burkina Faso opened its first refinery, Raffinor-BF, on September 28th, and Guinea shipped its first locally refined gold bars on October 9th. Côte d'Ivoire plans to open its own refinery by mid-2027, and Mali is developing one with Russia's Yadran Group.

With a single tonne of gold now worth over $100 million, these projects signal a clear intention to capture more economic value before the metal reaches international markets. The potential benefits, however, extend beyond refining gains and building industrial capacity. As the inauguration of Raffinor-BF suggests, the core objective is to gain lasting influence over the value chain: what is counted, who buys it and where it ends up. This extends to the informal mining sector, a key producer in West Africa, where governments want to counter exploitation of illegal mining ecosystems by criminal networks and non-state armed groups.

Yet these national projects do not operate in isolation. The Birimian gold belt stretches across Ghana, Mali, Burkina Faso, Côte d'Ivoire and Guinea, among other countries, putting their refineries in competition for the same supply. Their strategies also reveal different approaches to partnerships, ownership and market access. Ghana's Gold Coast Refinery works with South Africa's Rand Refinery; Guinea's plant involves UAE-based Emirates Minting Factory; Mali's project is 62% state-owned, with Russia's Yadran holding the remainder; Côte d'Ivoire plans to market its gold through US firm StoneX.

Access and alliances alone won't settle the real test that the region faces: can West African countries build a lasting gold refining industry rather than simply piling up capacity? Burkina Faso produced about 94 tonnes of gold last year, against stated refining capacity of 164 tonnes. Mali plans capacity for 200 tonnes despite annual output below 80 tonnes, while Guinea's Nimba project could eventually exceed 500 tonnes. These gaps raise a fundamental question about supply. Refineries will need reliable access to domestic production or gold sourced legally from neighbouring countries to avoid operating below capacity.

Ghana's Gold Coast Refinery, which remained underused for years, illustrates the risk. The production capacity of some of these countries is also affected by the ongoing security crisis, which in countries like Burkina Faso has already led to the withdrawal of potential investors. And even sufficient supply may not be enough. International buyers also need confidence in the quality and credibility of refined gold. As of now, no West African refinery is on the London Bullion Market Association's Good Delivery List, underlining that local processing does not automatically guarantee acceptance in established markets.

Taken together, these elements show that West Africa's refining ambitions have reached a decisive stage. Building plants can bring refining closer to its source, but lasting gains will depend on securing supply, meeting international standards and finding reliable buyers. The biggest refinery will not necessarily secure the best position in international markets. The value of West Africa's gold will be ultimately decided in and by those countries which will be able to keep their refineries running and produce commercially trusted gold.

Strange tides in the East Med

Libya's eastern parliamentary body announced the ratification of a controversial 2019 memorandum to set up a maritime corridor linking Türkiye's exclusive economic zone (EEZ) with Libya's.

BY: FRANCESCO MERIANO

Ankara's latest victory in Libya is causing ripples across the eastern Mediterranean. On October 20th the House of Representatives, Libya's eastern parliamentary body, announced the ratification of a controversial 2019 memorandum to set up a maritime corridor linking Türkiye's exclusive economic zone (EEZ) with Libya's. The agreement effectively reshapes the two countries' maritime boundaries in Türkiye's favour, granting it access to a stretch of hydrocarbon-rich sea between Crete and the Gulf of Sirte.

The deal had first taken shape between the Tripoli government and Türkiye in 2019, when the then-prime minister Fayez al-Serraj had offered Ankara access to the offshore deposits in exchange for military support against eastern Libyan warlord Khalifa Haftar. While the Haftar-aligned House had first denounced the deal, a subsequent thaw in relations with Türkiye – which doubted the Tripoli government could deliver on its promise alone – led Haftar to soften his stance in hopes of drawing Ankara on his side.

The last major obstacle between Türkiye and offshore Libyan gas was then House speaker Aguila Saleh. By positioning himself as a key conduit between the Haftars and Parliament, Saleh had been able to stave off attempts to end his long tenure. As most deputies increasingly chafed under his rule, however, Saleh's opposition to the Türkiye-Libya memorandum triggered his downfall. On October 19th, in Saleh's absence, a quorum of MPs gathered to retroactively introduce time limits for the speakership, in what amounted to an official removal.

Behind this sudden shift was Saddam Haftar, Khalifa's youngest son and heir, in a distinct hurry to push the memorandum through. Saddam is among the main beneficiaries of the US bid to unify Libya's rival governments into a single polity: according to the plan outlined by Massad Boulos, Donald Trump's advisor for African affairs, a US-backed transition would see Saddam joining the Presidential Council – Libya's tripartite head of State – while Abdul Hamid Dabaiba retained the premiership from Tripoli. Fearing being sidelined, Dabaiba was redoubling efforts to derail US plans and had implicated Saddam in a recent drone attack against Libya's sole refinery in Zawiya. Fearing this might derail his presidential bid, Saddam likely calculated that securing the gas for Ankara would tip the scales by granting him Türkiye's political backing.

The House of Representatives (HoR) approval is a clear success for both Saddam and Türkiye, but it is also stoking tensions among Mediterranean states. Its chief opponent is Greece, as the memorandum includes gas deposits south of Crete that Athens considers its own. But the maritime deal could also derail rapprochement between Türkiye and Egypt. On opposite sides of regional divides until 2022, Ankara and Cairo had since then sought to smooth their divergences and bolster trade and cooperation. However, Egypt's opposition to the memorandum – which it says cuts into its own territorial waters – has remained unsolved. After Cairo renewed its condemnation of the deal in the last few days, Ankara floated an offer to review maritime demarcation that would grant Egypt (according to "mutual interests") "over 15,000 square kilometers" of Turkish waters, in exchange for acquiescence over the Turkish-Libyan deal. A move to which Egypt has yet to respond – and that likely also aims to prevent the revamping of a Greek-Egyptian entente.

As the eastern Mediterranean boils, a visit to Athens by UAE crown prince Mohamed bin Zayed adds a further layer of complexity. Bin Zayed's visit on October 21st, ostensibly undertaken to celebrate fifty years of diplomatic relations between Abu Dhabi and Greece, soon doubled as a show of Emirati support for Athens. The UAE, whose interests in the Red Sea and Sudan run counter to those of both Egypt and Türkiye, would likely welcome a rift between the two and may work to deepen it should the occasion arise.

Ports: the engine of Africa's growth

For African ports to become real engines of growth, authorities must transform them in platforms for processing and manufacturing...

BY: CORRADO ČOK

The current growth of African ports presents pivotal opportunities for the continent. Growing economies and urbanisation are boosting the flow of goods between the seas and the hinterland or between Africa's coastal countries, with African ports featuring as key enablers of the African Continental Free Trade Area (AfCFTA). Lloyd's List now counts seven African ports in its 2026 global top 100, up from four a year earlier. Among the world's largest ports, Africa's posted the fastest regional growth in 2025, with volumes up 12%.

An emerging growth factor is transhipment. Security crises in the Gulf and the Red Sea pushed carriers towards the Cape of Good Hope and turned African hubs into relay points between Asia, the Middle East and Europe. Tanger Med in Morocco handled a record 11.1 million TEU in 2025 (+8.4%) serving routes to Europe. Togo's Lomé grew 16% to 2.4 million TEU, consolidating its role as West Africa's relay hub. Kenya's Lamu rose as a critical transhipment hub for traffic redirected from Dubai, while Dar es Salaam has grown through transhipment and export to Rwanda and the DRC.

Growth also exposes weaknesses. Durban, southern Africa's main gateway, and key relay hub along the Cape route ranked 398th of 400 in the World Bank's 2025 Container Port Performance Index and continues to experience logistical faults that cause congestion and loss of traffic. Inadequate facilities, limited storage capacity and low customs efficiency are frequent issues adding costs to Africa's port logistics and discouraging carriers.

Elsewhere the constraints lie on land. Lekki, Nigeria's deepest port, runs at about half its capacity because road and rail links lag. Dar es Salaam remains constrained by road and rail bottlenecks as well, while Lamu needs the development of the LAPSSET corridor spanning Kenya, Ethiopia, Uganda and South Sudan to emerge beyond the transhipment business. These factors hinder Africa's deeper participation in the global value chains and require new investments.

Global operators are positioning along this trend. Emirati groups now finance the largest share of new capacity. DP World, which is building new deep-water gateways in Ndayane in Senegal and Banana, the DRC's first deep-water port, set out plans this year to invest another $3 billion in African ports and logistics. It also signed deals for a 10,000-hectare port and economic zone in Nigeria's Ogun State and an industrial zone in Mombasa, Kenya, in September. African operations have helped keep DP World afloat despite the heavy losses faced in its core facility - Dubai's Jebel Ali. In parallel, Abu Dhabi Ports is assembling an Atlantic network from Luanda to Pointe-Noire, close to Central Africa's mining corridors.

European carriers are also tying African terminals into their shipping networks. In March, MSC secured a 45-year concession in Lagos, as part of a $1-billion investment to improve the connectivity of Nigeria, Africa's largest market. Its subsidiary AGL took over the port of Lobito, whose expansion is a critical enabler of mineral trade from the Lobito Corridor, and Bagamoyo in Tanzania, where construction is expected to start in December. Chinese capital, meanwhile, increasingly arrives as industrial tenants, such as the Chinese manufacturing deals signed at Egypt's Sokhna zone.

The overarching prize is value addition. For African ports to become real engines of growth, authorities must transform them in platforms for processing and manufacturing, not just conduits for raw commodities and transhipped containers. Tanger Med is a case in point: its 3,000 hectares host more than 1,500 firms and about 145,000 jobs, which generated almost $20 billion of industrial turnover in 2025, led by automotive. The Kribi industrial zone in Cameroon and DP World's Mombasa Industrial Park aim to replicate the model.

The strong investment pipeline of 2026 fosters this effort, which must be coupled with stronger port governance, efficient customs and hinterland links to ultimately succeed.

From Farm to Cup: *Bringing Kenyan Coffee to Italy*

Interview with John Seroney, Founder & CEO, Sumseron Coffee & Tea Ltd

Kenyan coffee is attracting renewed international interest as producers seek more value and stronger links with global markets. John Seroney, Founder and CEO of Sumseron Coffee & Tea Ltd, is working across the coffee value chain as both a producer and trader, linking smallholder farmers to international buyers while investing in quality, traceability and social impact. The company already exports to markets including the United States and Norway. In July 2026, Sumseron dispatched the first of a 20-container consignment of premium green coffee to Italy's Port of Trieste. Seroney spoke to Med-Or about the family story behind the business, the Italian market and the partnerships that could take Kenyan coffee further.

Q. Your connection to coffee began with your father. How did that shape Sumseron?
A. My father, Stephen Cheruiyot Seroney, pioneered coffee in our area in 1978, planting SL34 coffee in the lowlands of Kericho County. He had nine children and did not want us to struggle with school fees, so coffee became his way of providing for the family. Through coffee, he educated all of us through university. Working alongside him, I saw coffee not simply as a crop, but as a source of opportunity and stability for families. That became the foundation for Sumseron.

Q. What gap did you want the company to address?
A. I established Sumseron in 2018; it became operational in 2021 and gained significant traction in 2024. As both a producer and trader, I saw the challenges from both sides of the value chain. I wanted to improve the quality of Kenyan coffee, tell the story of where it comes from and who produces it, and address challenges such as delayed payments to farmers. The sector also needs greater transparency and stronger governance across the value chain, so that producers have a clearer relationship with buyers and greater confidence in how their coffee is marketed and sold. Our aim is to build stronger, more transparent relationships between producers and international markets.

Q. What does your "farm to cup" model look like in practice?
A. We work with producers and cooperatives in five counties - Kericho, Bungoma, West Pokot, Trans-Nzoia and Kiambu - involving around 5,000 women and young people. In Kipkelion alone, we work with about 1,500 farmers. Traceability is central to our model. We do not simply know where the coffee comes from; we use live monitoring to follow farming at the producer level, allowing us to track production and quality more closely. This gives buyers greater visibility into the coffee they are purchasing and gives farmers a stronger connection to the market.

Q. Beyond the coffee itself, how are you trying to strengthen the livelihoods of the farmers you work with?
A. For us, coffee is not only about what happens when the crop is sold. We want it to contribute to the wider wellbeing and long-term security of the families producing it. For women in our programme, we provide Social Health Authority cover, giving them access to health insurance, and support the education of their children by helping with school fees. These costs can be deducted before the sale of their coffee, making the support directly linked to their farming income. We are also investing in the future of production through seed programmes, with around 200,000 seedlings in Kericho and 300,000 in Kitale, Trans-Nzoia. At the same time, farmers are facing the growing effects of climate change, so sustainability and adaptation are increasingly important to how we approach coffee production. The aim is to create a coffee business in which quality, farmer welfare and the long-term sustainability of production reinforce one another.

Q. Sumseron already reaches international markets. How did you establish those relationships, and how did Italy come into the picture?
A. We have been exporting to markets including the United States and Norway, and began engaging more closely with the Italian market in 2023. International buyers increasingly want to know three things: where does the coffee come from, who produces it, and what is its quality? Building those relationships takes time. Capacity-building and market-access programmes, including Italy's AICS-supported WONDER programme and E4Impact, helped us understand European requirements around compliance, documentation, traceability and logistics.

Q. In July, you made your first direct shipment of Kenyan green coffee to Italy. What does that milestone represent?
A. It is a major milestone, but I see it as a beginning. In July 2026, we dispatched the first of a 20-container consignment of premium green coffee to the Port of Trieste. For me, it connects directly to my father's story in 1978. But it is also bigger than our family. It represents thousands of farming families seeking reliable access to international markets and a more direct connection between Kenyan producers and international consumers.

Q. Where do you see opportunities for Italian companies?
A. Italy has deep expertise in coffee roasting, processing, machinery, packaging and value addition. Kenya has the producers, agricultural potential and a coffee with an established international reputation. Bringing those strengths together can create value on both sides. We are interested in partnerships around markets, technology, processing and roasting, laboratory and quality infrastructure, energy solutions and growth capital. At present, we export green coffee for roasting in destination markets. In the longer term, there is significant potential to process, roast and package more in Kenya, allowing more value to remain in the country.

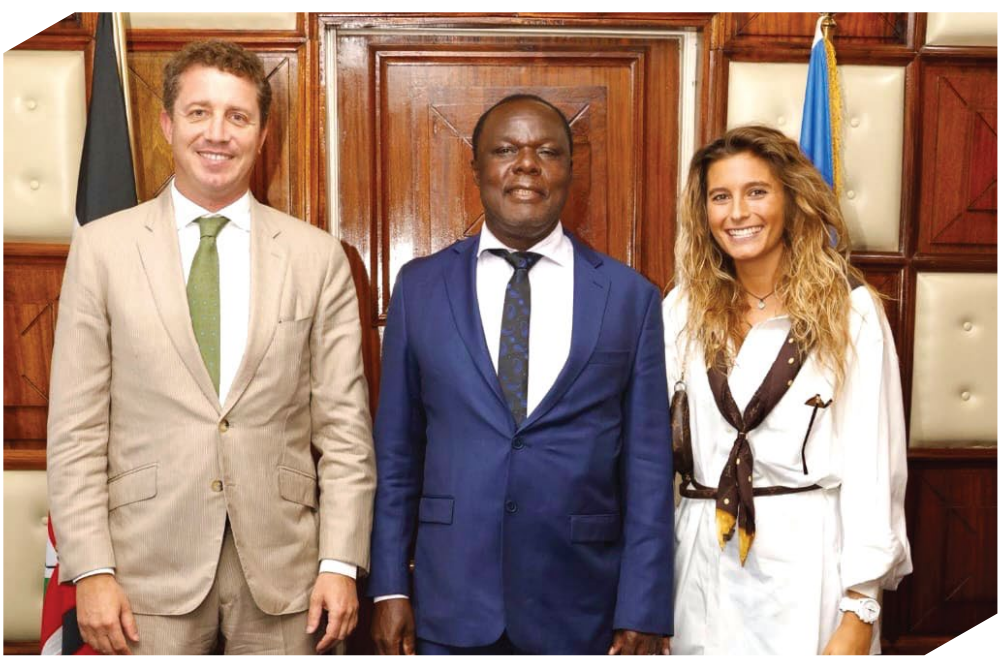
Q. What will it take to scale that opportunity?
A. Maintaining quality and consistency from one harvest to the next remains a challenge, particularly where post-harvest handling is not sufficiently trained. Quality seed and stronger lab capacity are also important. Scaling exports requires working capital, processing and packaging infrastructure, reliable energy, traceability systems and the technical capacity to meet international requirements. Export readiness is not only about finding a buyer; it is about having the systems and capital to deliver quality consistently.

Q. What is your ambition for Sumseron?
A. My ambition is to build a Kenyan coffee company that connects farmers directly to global markets while keeping quality, traceability and impact at the centre. The shipment to Italy is not the end of the story. It demonstrates what can happen when producers, entrepreneurs, government, development partners and international businesses work together. The next step is to turn that opening into long-term trade, investment and value addition.

PHOTO GALLERY



Med-Or participating in the EU-Tanzania Investment and Business Forum in Cesena, Italy, dedicated to Tanzania's vision and investment opportunities in agriculture, digital transformation and energy



Med-Or Africa Executive Director Umberto Tavolato and advisor Asja Amail meet Dr. Juma Mukhawana, Permanent Secretary of Industry of the Republic of Kenya to discuss new opportunities for logistics and industry in Kenya



Med-Or Africa first round table organised at its headquarters in Nairobi in partnership with IGAD titled "Corridors & Chokepoints: From Hormuz to the Bab-el-Mandeb: How Maritime Disruption Will Reshape Strategic Infrastructure and Connectivity across Horn and East Africa"



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