

AMCHAM BUSINESS SUMMIT

U.S. - EAST AFRICA TRADE & INVESTMENT FORUM

CRITICAL MINERALS

EAST AFRICA'S CRITICAL MINERALS VALUE CHAIN

REPORT AND POLICY RECOMMENDATIONS

THE SUMMIT FOCUS

Building on the momentum of previous editions of the U.S. - East Africa trade and investment summit, our platform brings together influential decision makers, facilitates direct business-to-business engagement, and fosters constructive private-sector led dialogue with the public sector and development partners. Our unwavering focus is on expanding markets, catalyzing business growth, and driving job creation and economic prosperity across borders.

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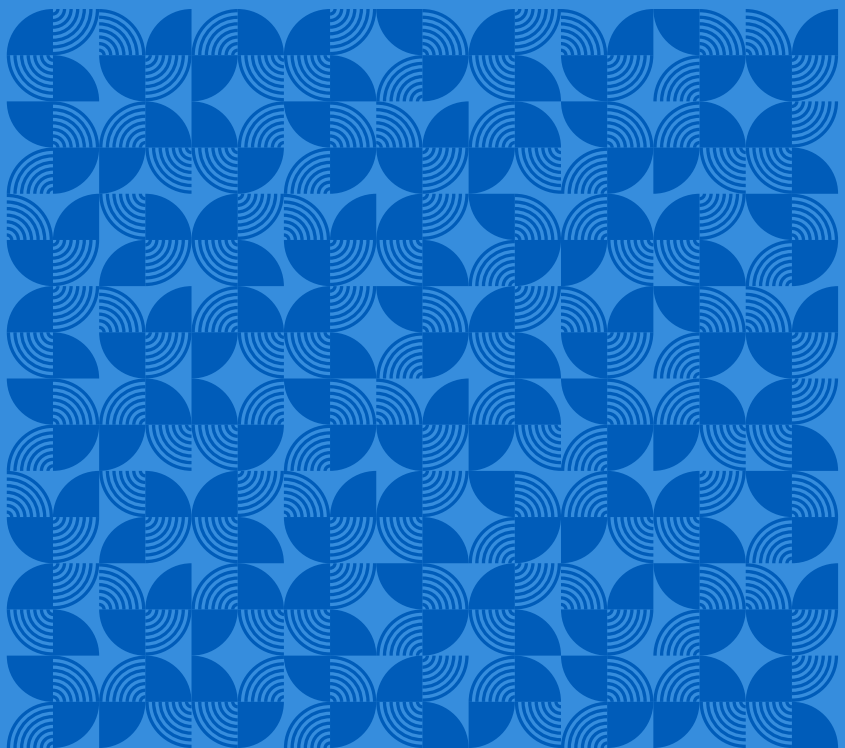
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EAST AFRICA'S

CRITICAL MINERALS VALUE CHAIN



OPPORTUNITIES FOR PRIVATE SECTOR INVESTMENT AND NATIONAL BENEFICIATION

As global competition for critical minerals intensifies and supply chains undergo significant reconfiguration, East Africa is emerging as a region with the resources, infrastructure and human capital to play a greater role in the global minerals economy. At the AmCham Business Summit 2026, policymakers and industry leaders examined how Kenya and the region can move beyond the export of raw materials toward domestic beneficiation, regional value chains and greater participation in higher-value segments of the global critical-minerals market.

KENYA'S AMBITION TO BECOME A CRITICAL MINERALS PROCESSING HUB



MODERATOR

Declan Gavin

Managing Director,
Exigent Risk Advisory

Kenya is positioning local mineral processing and beneficiation as a central component of its economic strategy. Harry Kimtai, Principal Secretary at the State Department of Mining, outlined the Government's policy direction requiring greater in-country beneficiation as Kenya continues to identify significant deposits of gold, niobium, rare earth elements and lithium. The shift is intended to capture more value domestically while generating employment, increasing foreign-exchange earnings and ensuring that communities and the wider economy benefit more directly from mineral extraction. It also reflects a broader effort to address longstanding concerns over the limited value retained in countries that primarily export raw minerals.



Harry Kimtai

Principal Secretary ,
State Department of Mining

Kimtai emphasized that Kenya's updated Mining Act places sustainability and accountability at the centre of the sector, making responsible mining an important consideration for investors. He also stressed the importance of ensuring that mineral wealth delivers lasting benefits to communities and future generations.

Kenya's ambition, he noted, is to become an active participant in global critical-minerals value chains rather than simply a source of raw materials. This will require partnerships that combine Kenya's mineral resources and human capital with international capital, technology and market access.

The country's expanding infrastructure base provides an important foundation for this ambition. Investments in the Port of Mombasa, Lamu Port, the LAPSSET Corridor and the Standard Gauge Railway are strengthening Kenya's position as a regional logistics and trade hub. The Government has also completed a National Geophysics Survey to improve understanding of the country's mineral potential and support more transparent, de-risked investment opportunities through open tendering. Kimtai further highlighted the establishment of a Sovereign Wealth Fund as a mechanism for safeguarding mineral royalties and ensuring that the benefits of mineral development extend to future generations.

A U.S.–AFRICA PARTNERSHIP FOR RESPONSIBLE MINERALS DEVELOPMENT

The discussion also examined the role of international partnerships in building resilient and diversified critical-minerals supply chains. Chris Kilukundis, Deputy Assistant Secretary of State for Southern Africa, emphasized that mining investments are inherently long-term commitments requiring alignment between companies, host governments and investor governments.



Chris Kilukundis
Deputy Assistant Secretary of State for Southern Africa

Government-to-government engagement, he noted, can help establish the confidence and policy environment necessary to advance major investments and strengthen long-term commercial partnerships.

Panelists acknowledged that beneficiation is considerably more capital- and technology-intensive than mineral extraction. Developing processing and refining capacity requires reliable and affordable electricity, water, advanced technology, skilled talent and supporting infrastructure. The region will therefore need investment models that bring together local resources and capabilities with international financing, technology and technical expertise.



Dr. Melba Wasunna
Country Director, Energy Fuels

Dr. Melba Wasunna, Country Director at Energy Fuels, emphasized that local content and community participation have become increasingly important in Africa's extractives sector. She positioned beneficiation as an opportunity to connect mineral resources more directly to national industrialization ambitions, enabling countries to capture greater economic value from assets extracted within their borders.

She also highlighted the complementary strengths that Kenya and the United States can bring to such partnerships: Kenya's human capital, financial and technical services and logistics capabilities, alongside U.S. capital, innovation and advanced technology.

RWANDA'S TRINITY METALS: A CASE STUDY IN SCALE AND PARTNERSHIP

Rwanda's experience with Trinity Metals offered a practical illustration of how government–private-sector alignment can transform mining into a broader engine of economic opportunity.

Peter Gelata, CEO of Trinity Metals, noted that the company has grown to become Africa's largest tungsten producer and employs approximately 6,500 people, 98% of whom are drawn from local communities. The company now supplies approximately 20% of U.S. tungsten concentrate imports, demonstrating the potential for African producers to connect directly with global markets.



Peter Gelata
CEO,
Trinity Metals

Gelata argued that scale will be critical to advancing downstream beneficiation. Individual African markets may not initially generate sufficient volumes to justify major processing facilities, but regional integration can aggregate resources and inputs, improving the commercial case for investment in refining and other downstream activities.

He also emphasized that strong government–investor alignment is fundamental to the success of long-term mining projects. A shared understanding of development objectives, responsibilities and expectations can create the stability required to sustain investment over multiple decades.

DEPLOYING NEXT-GENERATION TECHNOLOGY FOR BENEFICIATION AND TRACEABILITY

Technology was identified as an increasingly important enabler for overcoming some of the infrastructure, environmental and traceability challenges associated with mineral processing.



Amb. (ret) Troy Fitrell
CEO,
Sagint International

Amb. (ret.) Troy Fitrell, CEO of Sagint International, argued that advances in processing technologies are changing the feasibility of local beneficiation. He pointed to emerging approaches such as chromatographic separation, which can enable rare-earth processing while addressing some of the environmental limitations associated with conventional methods.

His central message was that African markets should not necessarily replicate legacy processing models. Instead, new investments can provide an opportunity to deploy more efficient, environmentally responsible technologies from the outset.

Amb. (ret.) Troy also highlighted the growing importance of end-to-end mineral traceability as global buyers and regulators place greater scrutiny on the origin of critical minerals. Increasing requirements for verified sourcing are creating both compliance obligations and an opportunity for African producers to differentiate themselves through transparent, digitally enabled supply chains.

He noted that many companies still rely on fragmented, paper-based verification processes, creating inefficiencies and leaving room for uncertainty around mineral provenance. Digital traceability systems could provide more credible and efficient mechanisms for verifying supply chains, particularly for minerals entering highly regulated global markets.

Looking beyond individual mining and processing projects, Amb. Fitrell proposed the development of an African minerals and metals exchange headquartered in Kenya. Such a platform, he argued, could build on Kenya's digital financial infrastructure, warehouse-receipt systems and regional logistics position to support more efficient trading of minerals and metals across the continent.

FROM MINERAL RESOURCES TO INDUSTRIAL VALUE CHAINS

The discussion reinforced that East Africa's critical-minerals opportunity extends well beyond extraction. The region's competitiveness will increasingly depend on its ability to process minerals locally, aggregate regional supply, deploy advanced technology, attract long-term capital and retain a greater share of value within Africa.

For Kenya, the combination of mineral potential, infrastructure, human capital and financial and digital capabilities provides a foundation for deeper participation in global critical-minerals markets. Realizing that potential will require predictable investment frameworks, responsible mining practices, strong community benefits, regional integration and partnerships that connect African resources and capabilities with international capital, technology and market access.

The opportunity is therefore not simply to extract more minerals, but to build the industrial, technological and financial ecosystem around them, positioning critical minerals as a catalyst for manufacturing, employment, innovation and long-term economic transformation across East Africa.



KEY OUTCOMES AND STRATEGIC PRIORITIES

01 **Accelerate local beneficiation and value creation**
Embed mineral processing and beneficiation within Kenya's economic strategy to capture greater value domestically and reduce dependence on raw mineral exports.

02 **Advance responsible, sustainable and community-centred mining**
Strengthen responsible mining practices that generate employment, foreign-exchange earnings and tangible benefits for communities in mineral-producing regions.

03 **Position Kenya as a regional critical-minerals hub**
Leverage strategic investments in ports, railways and transport corridors to strengthen Kenya's role in regional mineral processing, trade and value chains.

04 **Build long-term U.S.–Kenya partnerships around value creation**
Develop partnerships that combine transparency, technology transfer, financing and local capability development, moving beyond extraction-focused investment models.

05 **Mobilize capital and technology for beneficiation**
De-risk the capital-intensive transition to local processing by combining Kenya's natural resources, human capital and regional position with U.S. technology, expertise and investment.

06 **Strengthen regional integration to achieve scale**
Integrate East African mineral resources and markets to create the scale required for downstream processing, attract global investment and strengthen regional competitiveness.

07 **Deploy technology to improve efficiency, sustainability and traceability**
Adopt advanced processing technologies and digital traceability systems to improve environmental performance, operational efficiency, supply-chain transparency and compliance with evolving global standards.

08 **Develop regional market infrastructure for minerals and metals**
Explore the establishment of an African minerals and metals exchange in Kenya to improve market transparency, strengthen traceability, facilitate trade and anchor regional critical-minerals value chains.

POLICY RECOMMENDATIONS

01 **Institutionalize in-country beneficiation and domestic value addition**
Require meaningful in-country processing and beneficiation across mining licenses to increase domestic value capture, create quality employment and strengthen linkages between the mining sector and the wider industrial economy.

02 **Operationalize the Sovereign Wealth Fund for long-term value creation**
Establish and operationalize the Sovereign Wealth Fund to channel mineral royalties into sustainable community development, economic resilience and intergenerational wealth creation.

03 **Invest in enabling infrastructure for mineral processing and industrialization**
Expand access to reliable, affordable energy and water infrastructure to support processing operations, improve the competitiveness of beneficiation projects and accelerate mining-led industrialization.

04 **Establish a Kenya–U.S. critical-minerals partnership framework**
Develop a structured bilateral framework focused on technology transfer, investment and financing, skills development and technical cooperation to build Kenya's capacity across the critical-minerals value chain.

05 **Deepen regional integration to achieve scale and attract investment**
Strengthen regional agreements and mechanisms that enable the pooling of mineral resources, harmonize standards and facilitate cross-border investment in refineries, processing facilities and downstream manufacturing.

06 **Accelerate adoption of cleaner, advanced processing technologies**
Promote the deployment of innovative, environmentally responsible processing technologies, including advanced separation methods, to improve recovery rates, reduce ecological impacts, and strengthen the sustainability of mineral development.

07 **Establish robust digital traceability across mineral supply chains**
Implement interoperable digital traceability systems that provide end-to-end visibility of mineral origins and transactions, strengthen compliance with evolving global standards and enhance investor and market confidence.

08 **Develop a regional minerals and metals exchange in Kenya**
Explore the establishment of an African minerals and metals exchange headquartered in Kenya to promote transparent price discovery, strengthen traceability, improve trading efficiency and position the country as a regional hub for critical-minerals markets.

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