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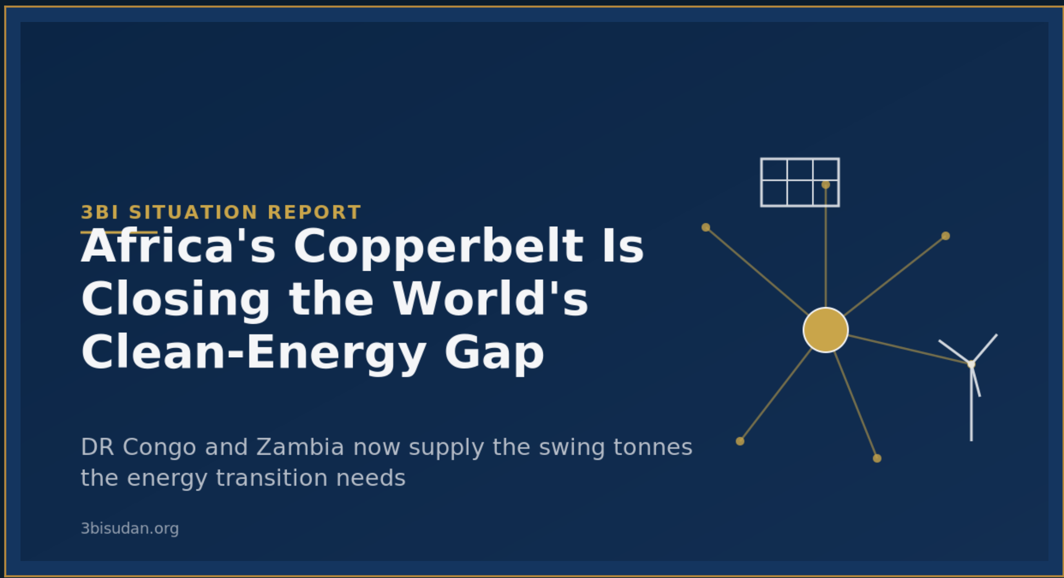

Congo and Zambia Are Now the World's Swing Factor in the Clean-Energy Copper Squeeze

DR Congo and Zambia now supply the swing tonnes the clean-energy transition needs

Research Team

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Clean-energy copper demand rose 41% since 2021. IEA data shows DR Congo and Zambia are now the world's largest contributors to closing the global copper supply gap — but sulphuric-acid supply may be the hidden constraint.

Headline Fact

Global copper demand tied to clean energy — grids, electric vehicles, solar, and wind — grew 41% between 2021 and 2025, four times faster than every traditional use of the metal combined, according to International Energy Agency data reported by Attaqa on 3 August 2026. Two African countries, the Democratic Republic of Congo (DRC) and Zambia, are now the single largest contributors to closing the resulting global supply gap, per the IEA's Global Critical Minerals Outlook 2026 (published 16 July 2026, summarized by Energy Transition Africa). Their ability to do so may hinge on an input almost nobody is tracking: imported sulphuric acid.

Timeline

2021–2025: Global copper demand rose 11%, from 25 million to 27.8 million tonnes. Within that total, clean-energy demand rose 41%, from 5.65 million to 8 million tonnes — lifting clean energy's share of total copper demand from 23% to 29%. Electric-vehicle-linked copper demand jumped 200%, to 794,000 tonnes; solar-linked demand rose 180%, to 1.97 million tonnes. (Source: IEA data via Attaqa, 3 August 2026.)

2025: The DRC produced an estimated 3.5 million tonnes of copper, the world's second-largest output after Chile. Zambia produced a record 890,346 tonnes. Together the two countries account for roughly one-sixth of global mined copper. (Source: Discovery Alert and Canadian Mining Report industry data, cross-checked against USGS-based reporting via Daba Finance/AllAfrica, 8 January 2026.)

16 July 2026: The IEA's Global Critical Minerals Outlook 2026 finds the global copper market faces a projected 2035 supply deficit of roughly 25% under current policy — down from the 30% gap projected in the IEA's previous outlook — with the DRC and Zambia together the largest contributors to that improvement. The two countries are projected to add almost 650,000 tonnes of copper supply by 2035 beyond what last year's IEA assessment assumed, driven by expansion at the Kisanfu deposit in the DRC and the Lumwana mine in Zambia. (Source: Energy Transition Africa's reading of the IEA outlook, 16 July 2026.)

Early-to-mid 2026: Copper prices, which averaged a forecast $10,500 a tonne for 2026 as of a January 2026 market outlook, have since surged past $14,000 a tonne, reflecting tighter-than-expected concentrate supply reaching global smelters. (Sources: Daba Finance/AllAfrica, 8 January 2026; Energy Transition Africa, 16 July 2026.)

2026, ongoing: The IEA outlook flags that roughly 45% of DRC copper production depends on acid-based hydrometallurgical leaching — exposing close to 1.5 million tonnes of copper output to the price and availability of imported sulphuric acid, which the report estimates at about 20% of production costs given the composition of Congolese ore. The outlook links this exposure to disruptions in Middle East sulphur supply and restrictions on Chinese sulphuric-acid exports. Zambia faces comparable but partially cushioned exposure through regional supply relationships. (Source: Energy Transition Africa's reading of the IEA outlook, 16 July 2026.)

Ongoing: Two competing export corridors are being built out to move the region's copper to global markets — the US- and EU-backed Lobito Corridor running west to the Atlantic, which has drawn a $553 million US Development Finance Corporation commitment for Benguela rail upgrades, and a China-backed $1.4 billion upgrade of the Tazara railway running east to Tanzania's Indian Ocean coast. (Source: Daba Finance/AllAfrica, 8 January 2026.)

What We Know / What We Don't

We know the demand trajectory through 2025 and the IEA's 2035 projections, both independently sourced and dated. We know the DRC and Zambia are the specific projects (Kisanfu, Lumwana) the IEA credits with narrowing the gap, and we know the scale of the sulphuric-acid exposure the outlook flags.

We do not yet have confirmed full-year 2026 production figures for either country — the year is not over, and Zambia's own 2026 forecast of "above 1 million tonnes" is a target, not a result. We do not know whether the sulphuric-acid supply risk will materialize into an actual disruption this year, nor how the Lobito–Tazara corridor competition will resolve, nor whether the DRC will extend to copper the kind of export-quota mechanism it applied to cobalt in 2025.

Do-No-Harm Note

This item concerns market data, trade infrastructure, and mineral-policy mechanisms; it does not identify or characterize any named individual or specific community. Where the underlying reporting referenced governance measures affecting artisanal mining, that reference was kept general rather than location- or person-specific, consistent with 3Bi's do-no-harm protocol. No further sensitivity concerns were identified in this item.

What to Watch

Zambia's and the DRC's confirmed full-year 2026 production totals, expected in early-2027 government and IEA reporting. Any move by Kinshasa to apply a cobalt-style export quota or strategic reserve mechanism to copper — a lever the government has already used on cobalt since September 2025. Further signals on sulphuric-acid supply and pricing, given the report's warning that a disruption there would constrain copper output even where ore reserves remain untouched. Progress on Lobito Corridor and Tazara railway construction milestones, which will shape who captures the logistics value of the region's growing output.

Sourcing & Next Update

Primary: "[illegible] ..2030 [illegible] 3 [illegible]," Attaqa, 3 August 2026, citing International Energy Agency copper-demand data. Cross-checked against: "IEA 2026: Africa's Minerals Are Rising. Its Refining Capacity Is Not.," Energy Transition Africa, 16 July 2026, summarizing the IEA's Global Critical Minerals Outlook 2026; "Africa's Copper Market Faces Supply Strain As Demand Stays Firm," Daba Finance via AllAfrica, 8 January 2026; and industry production data via Discovery Alert and the Canadian Mining Report. 3Bi will publish a follow-up once confirmed full-year 2026 production figures or a material corridor/quota decision is announced.

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