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The Extractor

Mining, Energy, Construction and Logistics

VOLUME 05 | Edition 31 WEDNESDAY, 25 NOVEMBER 2026

Ongwe draws Twin Hills parallels at Nguni

Chief executive Dave Underwood says Ongwe's maiden drilling programme at Nguni had already produced stronger gold intersections than those recorded during the initial drilling campaigns at Twin Hills in 2018.



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COVER STORY



Ongwe draws Twin Hills parallels at Nguni

Ongwe Minerals chief executive Dave Underwood has drawn parallels between the Nguni gold discovery and the early exploration campaigns that led to the discovery of Namibia's Twin Hills gold deposit.

Underwood said Ongwe's maiden drilling programme at Nguni had already produced stronger gold intersections than those recorded during the initial drilling campaigns at Twin Hills.

"The first phase of drilling at Nguni has already far surpassed the initial drilling we did at Twin Hills, which is very encouraging," Underwood said.

Ongwe announced on 24 November 2026 that its maiden drilling programme at Nguni had returned significant gold intersections, including 20 metres grading 1.31 grams per tonne and 12 metres at 1.58 grams per tonne.

The results come approximately six months after the company discovered Nguni through regional soil sampling and just over two months after commencing its maiden drilling campaign.

Underwood recalled that the discovery of Twin Hills followed several unsuccessful drilling campaigns despite encouraging surface exploration results.

In early 2017, regional magnetic surveys and soil sampling identified a mineralised structure extending at least 50 kilometres along the Karibib Fault.

The first three drilling programmes conducted in 2017 and 2018 either missed the targeted mineralisation or intersected low gold grades, with the best

intersection being 10 metres grading 1.1 grams per tonne.

The Twin Hills discovery holes were only drilled in late 2018 following extensive additional exploration, including detailed ground magnetic surveys, calcrete geochemistry and bedrock sampling.

Ongwe is following a similar exploration approach at Nguni, where extensive surface cover has complicated the identification of geological structures controlling gold mineralisation.

Although the initial results compare favourably with those recorded at Twin Hills, Ongwe has yet to establish a mineral resource estimate or demonstrate Nguni's commercial viability.

From discovery to drilling

Nguni forms part of Ongwe's Omatjete Gold Project within the North Central Zone of Namibia's Damara Belt.

The discovery lies along the Okondeka Fault Zone, which also hosts WIA Gold's Kokoseb gold deposit and Ongwe's Manga gold discovery.

Following the identification of Nguni through regional soil sampling, Ongwe reduced its sampling grid from 200 by 200 metres to 50 by 50 metres to better define the gold anomaly.

On 6 August 2026, the company reported collecting 1 605 infill soil samples, of which 50 returned gold concentrations exceeding 300 parts per billion, with the highest reaching 1 310 parts per billion.

The results delineated a six-kilometre gold-in-soil anomaly, prompting Ongwe to prepare a 5 000-metre maiden drilling programme.

On 15 September, the company announced the commencement



mobilisation of two rigs.

The initial programme comprised 3 500 metres of diamond drilling across 18 holes and 1 500 metres of reverse circulation drilling across 13 holes.

The programme was subsequently modified, with Ongwe increasing the number of holes from 31 to 44 and undertaking considerably more reverse circulation drilling than initially planned.

The company ultimately completed 5 135 metres of drilling, comprising 3 974 metres of reverse circulation drilling across 37 holes and 1 161 metres of diamond drilling across seven holes.

The latest results cover 35 holes representing 4 263 metres of drilling, with assays from nine reverse circulation holes outstanding.

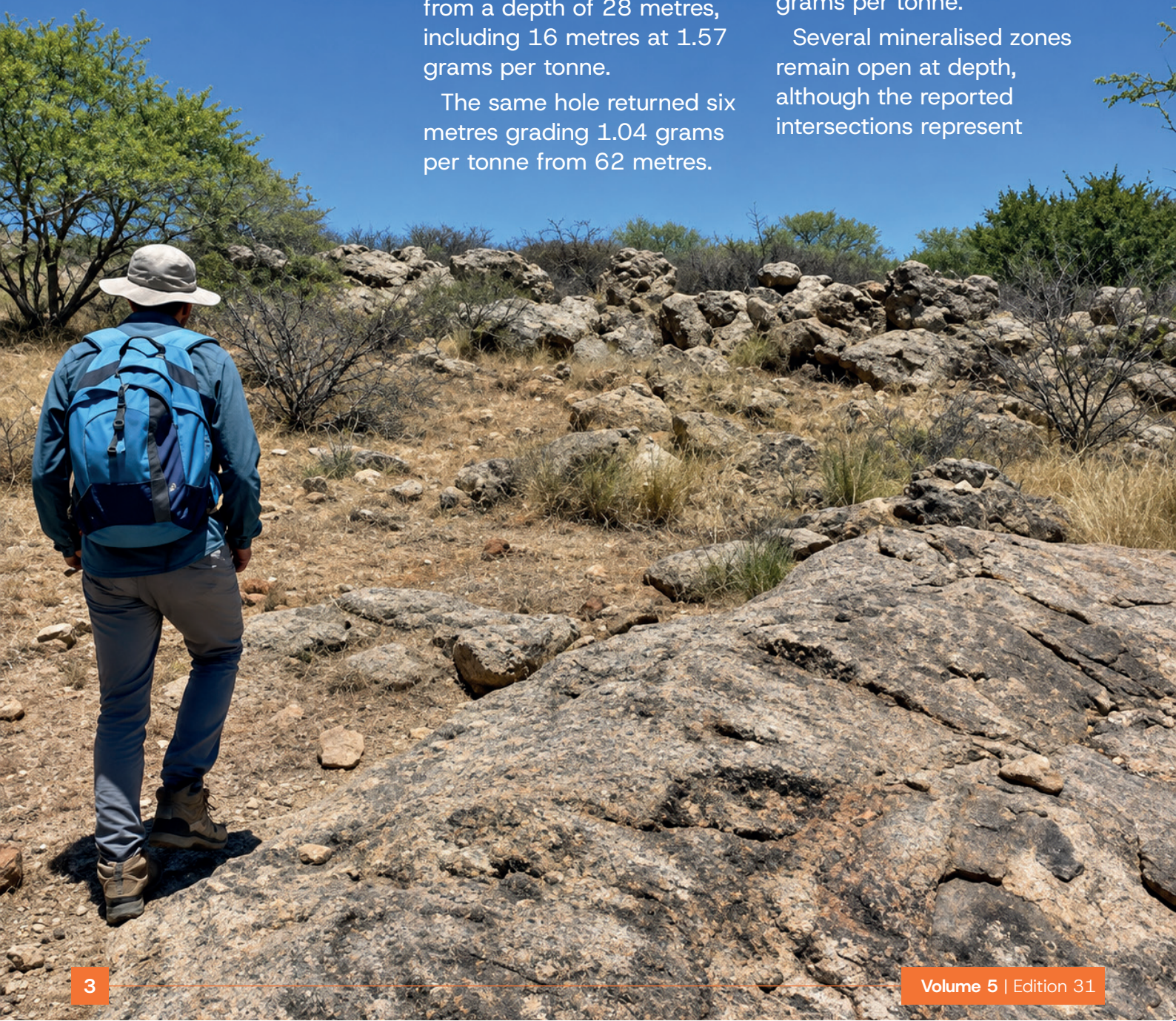
Drill hole NRC026 returned 20 metres grading 1.31 grams of gold per tonne from a depth of 28 metres, including 16 metres at 1.57 grams per tonne.

The same hole returned six metres grading 1.04 grams per tonne from 62 metres.

Diamond drill hole NDD010 intersected 12 metres grading 1.58 grams per tonne from 54 metres and a further five metres at 1.17 grams per tonne from 80 metres.

Other significant intersections included 23 metres grading 0.76 grams per tonne, incorporating eight metres at 1.65 grams per tonne, and 17 metres grading 0.80 grams per tonne, including six metres at 1.77 grams per tonne.

Several mineralised zones remain open at depth, although the reported intersections represent



downhole lengths rather than confirmed true mineralisation widths.

Identifying the geological controls

Much like the early exploration campaigns at Twin Hills, Ongwe's maiden drilling programme at Nguni has highlighted the importance of understanding the underlying geology before selecting drilling targets.

The mineralised rocks at Nguni lie beneath between one and 10 metres of sheetwash, colluvium, desert sand and calcrete.

The movement of surface material has displaced gold-in-soil anomalies from their underlying sources, making soil grades unreliable indicators of bedrock mineralisation.

Consequently, several early drill holes were not optimally positioned and intersected predominantly low-grade mineralisation, particularly in the northwestern part of Nguni.

Ongwe incorporated detailed drone magnetic surveys, diamond drilling and multi-element geochemistry to improve its understanding of the underlying geology.

The company subsequently established that stronger gold intersections occurred along geological contacts between quartz-biotite schist and cordierite schist.

These contacts were only recognised as important exploration targets during the later stages of the drilling programme.

Cordierite schist units have so far been confirmed in the eastern part of Nguni, where most of the stronger drilling intersections were recorded.

Ongwe believes these units could extend across the wider project area, providing considerable scope for further drilling.

The company has also identified geological similarities between Nguni and Kokoseb, particularly in the sulphide minerals associated with gold mineralisation.

A growing gold corridor

While Ongwe continues to investigate the geological controls of mineralisation, additional surface exploration has extended the inferred strike length of the Nguni gold-in-soil anomaly to more than nine kilometres.

Recent sampling northwest of Nguni identified a 1.5-kilometre-long gold-in-soil anomaly with grades reaching 0.55 grams per tonne.

The company has also discovered three additional gold-in-soil anomalies five kilometres southeast of Nguni, indicating further exploration potential along the regional fault structures.

Nguni lies 55 kilometres east of Kokoseb and 14 kilometres east of Manga, within a geological corridor extending at least 80 kilometres eastwards from Kokoseb.

Ongwe holds exploration licences covering at least 60 kilometres of this structure, while its maiden drilling programme at Nguni covered approximately four kilometres.

Underwood said identifying extensive gold mineralisation along geological structures was only part of the exploration process.

"The sediment-hosted gold deposits in Namibia are located along very large structural corridors which are mineralized along much of their length, but formation of an economic deposit requires a trap site with the right combination of lithology, structure and chemistry," Underwood said.

Ongwe is conducting follow-up soil sampling to establish the grade potential of the newly identified anomalies while continuing regional exploration to identify additional drilling targets.



Beneath Lithium Ridge lies a potential three-mineral mine

A US$7 million exploration campaign at Lithium Ridge in Namibia's Erongo region has revealed the potential for a mining operation producing lithium, tin and tantalum from a single mineralised system.

Situated 35 kilometres southeast of Andrada Mining's flagship Uis tin mine, Lithium Ridge is emerging as a critical minerals project whose commercial potential could extend beyond lithium.

What makes the project particularly interesting is the persistent presence of tin and tantalum within the same pegmatite system, raising the possibility of recovering three commercially valuable minerals from a single operation.

Andrada Mining released its sixth and final batch of assay results on 24 November 2026, concluding the analysis and reporting phase of a 16,525-metre diamond drilling campaign funded by international lithium producer SQM.

Across 143 diamond drill holes, the exploration programme established the continuity of a mineralised pegmatite system stretching approximately nine kilometres along strike and extending to depths approaching 300 metres.

Some mineralised intersections exceeded 30 metres in apparent width, while the system remains open at depth, meaning its full extent has yet to be established.

Lithium Ridge occupies mining licence ML133 within the NaiNais-Kohero pegmatite belt, which also encompasses the historical TinTan mine.



The presence of tin and tantalum is particularly significant given Andrada's existing mining and metallurgical experience at nearby Uis.

Rather than developing a project dependent entirely on lithium, Andrada could potentially recover multiple commodities, creating additional revenue streams and improving the economics of a future mining operation.

The final batch of assay results reported mineralised pegmatite intersections from 59 drill holes.

Among the strongest lithium results was a 15.94-metre intersection grading 2.20% lithium oxide, containing a higher-grade interval of 2.96 metres at 3.07%.

The broader intersection also contained 0.16% tin and 75 parts per million of tantalum.

Elsewhere, drilling returned 32.07 metres grading 1.02% lithium oxide, alongside 0.13% tin and 53 parts per million of tantalum.

Significant tin intersections included 0.53 metres grading 1.41% tin and 2.06 metres grading 0.79% tin.

Tantalum mineralisation included 2.56 metres grading 768 parts per million and 3.12 metres grading 594 parts per million.

Andrada believes the potential production of multiple revenue-generating commodities could improve the project's economics and effective operating cost position, although this remains subject to further metallurgical testing and economic evaluation.

Beyond the mineral grades, the geological arrangement of the pegmatite bodies could influence how Lithium Ridge is eventually developed.

Drilling encountered multiple stacked, sub-parallel mineralised pegmatites, a configuration that Andrada believes supports the potential for bulk open-pit mining in the upper sections of the deposit.

The presence of significant mineralisation close to the surface, coupled with deeper intersections, provides further

geological information for assessing potential mining configurations.

One of the deeper drill holes returned 24.17 metres grading 1.30% lithium oxide between 264.58 and 288.75 metres downhole, including eight metres at 1.67%.

Another returned 32.19 metres grading 0.92% lithium oxide between 256.47 and 288.66 metres downhole.

The reported intersections represent apparent widths rather than true mineralised thicknesses and do not establish commercially recoverable reserves.

Andrada chief executive Anthony Viljoen said the exploration campaign demonstrated the scale, grade and structural continuity of the mineralised system.

"These final assays close out the drilling campaign on a high note delivering shallow, high-grade lithium intersections, while simultaneously proving that wide, well-mineralised pegmatites, some exceeding 30 metres in apparent width, persist to depths approaching 300 metres. Equally compelling is the persistent tin and tantalum mineralisation across the licence. Leveraging Andrada's established operational and metallurgical expertise from our nearby Uis Mine, the potential to produce multiple critical minerals from a single operation could significantly enhance future project economics."

The involvement of SQM, one of the world's leading lithium producers, brings international investment and technical collaboration to Lithium Ridge.

Under a three-stage earn-in agreement, SQM has funded US$7 million in exploration expenditure to earn an initial 30% interest in Grace Simba Investments, the company holding the project.

The exploration programme was initially designed to cover 14,000 metres but was subsequently expanded by 2,525 metres to investigate



additional geological targets.

The expanded campaign tested the continuation of mineralisation at depth, areas where geological structures thicken and newly mapped parallel pegmatites beyond the main ridgeline.

A joint development committee with equal representation from Andrada and SQM oversees the programme.

The drilling campaign has also helped establish the geological boundaries of the mineralised system.

Seven drill holes either failed to intersect significant pegmatites or returned mineralisation below Andrada's minimum reporting thresholds.

These results provide additional geological information for refining the project's three-dimensional geological model and identifying future exploration targets.

With the first-stage drilling results now fully reported, the challenge is to translate the geological potential into a commercially viable mining project.

Metallurgical testing will be important in determining how effectively lithium, tin and tantalum can be recovered and whether their combined production can improve the economics of a future operation.

Andrada has not announced a construction decision, production schedule or development capital requirement in its latest statement.

Lithium Ridge nevertheless presents a potentially significant opportunity for Namibia to develop another multi-commodity mining operation within an established mining district.

Its ultimate commercial value may lie not in the lithium beneath the ridgeline alone, but in how much tin and tantalum Andrada can economically recover alongside it.



CRITICAL METALS



Highland revisits Uis tin potential amid growing AI and semiconductor demand

Highland Metals is reassessing the tin potential of its wholly owned Uis project in Namibia to position itself for anticipated growth in global demand from artificial intelligence infrastructure, semiconductor manufacturing and advanced electronics.

The Australian Securities Exchange–listed company announced on 23 November 2026 that a comprehensive review of historical exploration results had highlighted significant tin mineralisation across four separate pegmatite systems within exclusive prospecting licence EPL7345.

The review consolidates geological mapping, rock–chip sampling, reverse circulation drilling and systematic trenching results previously reported between May 2025 and June 2026, providing a technical foundation for prioritising future tin exploration across EPL7345 and EPL8535.

Historical exploration across EPL7345 involved 1,163 rock–chip samples, with grades reaching 4.05% tin oxide and 66 samples exceeding 0.25% tin oxide.

Highland believes the strengthening global tin market warrants renewed technical attention to the project's existing exploration data, particularly given the metal's widespread use in solder and electronic circuitry.

Highland Metals executive director Gino D'Anna said the review demonstrated the importance of tin to the project's broader mineral potential.

"This review brings together an extensive body of exploration information from Uis and demonstrates why we believe tin represents an important part of the Project's broader value proposition."

Tin mineralisation across four targets

The OP pegmatite, extending approximately 2.2 kilometres along strike, represents one of the most extensively explored targets within Highland's Uis portfolio.

The company previously completed 46 trenches covering 5,451 metres, generating 1,415 channel samples. Initial trenching was conducted on an 80-metre grid before additional work reduced the spacing to approximately 40 metres across most of the pegmatite.

Historical surface sampling returned grades of up to 1.64% tin oxide, while subsequent trenching recorded two metres grading 0.4985% tin, including one metre at 0.834%, and six metres grading 0.1014% tin.

Highland's technical review references the nearby Andrada Mining-operated Uis tin mine, citing a historical tin cut-off grade of 0.05% and an average grade of 0.15% tin at the V1/V2 deposit.

Although individual exploration intersections at Highland's project cannot be directly compared with the average grade of an established mineral deposit, the figures provide regional geological context for further exploration.

At the PS pegmatite, historical rock-chip sampling returned grades of up to 1.63% tin oxide, while trenching recorded 3.14 metres grading 0.3577% tin, including 2.20 metres at 0.5238%.

The DP pegmatite, extending approximately 700 metres along strike with an average reported surface thickness of six metres, was tested through 39 trenches covering 749 metres and generating 325 channel samples.

Significant intersections included 13.10 metres grading 0.093% tin, 8.32 metres at 0.0838% and 5.22 metres at 0.1293%.

At the K9 target, systematic trenching across an approximately 950-metre pegmatite trend returned 2.80 metres grading 0.181% tin, including 0.80 metres at 0.405%, and two metres at 0.1954% tin.

Five minerals in one project



Highland's renewed focus on tin forms part of a broader polymetallic exploration strategy encompassing lithium, tantalum, rubidium and caesium.

Previous exploration at the DP pegmatite returned peak individual assays of 1.25% lithium oxide, 364 parts per million (ppm) tantalum, 3,370 ppm rubidium and 587 ppm caesium, alongside peak tin values of 3,360 ppm.

The presence of five minerals gives Highland exposure to several technology-related and critical mineral supply chains, although the commercial recoverability of these



commodities has yet to be established.

The project is situated within Namibia's Cape Cross–Uis Pegmatite Belt, close to Andrada's operating Uis tin mine, with access to the Walvis Bay deepwater port through sealed road infrastructure.

Technology-driven tin demand



Highland identified the expansion of artificial intelligence and data centre infrastructure as a potential source of additional tin demand because of the extensive electronic systems required to support advanced computing operations.

Semiconductor manufacturing, computing hardware, communications equipment, consumer electronics and automotive electronics also underpin the metal's industrial importance.

Beyond electronics, tin has established applications in tinplate, chemicals and alloys, while electrification is increasing the deployment of electronic systems across transport, renewable energy infrastructure and industrial applications.

"Tin also gives Highland exposure to important structural trends across the global economy. Its role in solder makes the metal directly relevant to semiconductors, advanced electronics, computing infrastructure and electrification," D'Anna said.

Although Highland attributed its renewed technical focus to a strengthening global tin market, the company did not provide commodity price figures or quantified demand forecasts in its announcement.

Future exploration priorities

Highland intends to use its existing geological, geochemical, rock-chip sampling, trenching and drilling data to establish the distribution, geometry and continuity of tin mineralisation before determining appropriate future exploration programmes.

Particular attention will be given to the geological relationship between the OP, PS, DP and K9 pegmatites, alongside additional prospective areas across EPL7345 and EPL8535.

"The combination of multiple mineralised pegmatite targets, significant previously reported tin grades and an extensive existing exploration database provides Highland with a strong platform from which to evaluate the Uis tin opportunity alongside the Project's broader critical-minerals potential," D'Anna said.

The company has not announced a new exploration budget, drilling timetable or mineral resource estimate.

The latest review represents a reassessment of previously reported exploration results rather than a new mineral discovery, with further exploration and technical evaluation required to establish the project's commercial potential.

OIL & GAS

Namibia's road to 460,000 barrels of oil per day by 2035

Namibia could move from having no commercial oil production to pumping approximately 460,000 barrels of liquids per day within nine years, according to projections by Welligence Energy Analytics.

The international petroleum research firm expects production to begin at Capricornus in 2030, followed by Venus and Mopane, with combined output from the three Orange Basin developments peaking between 2034 and 2035.

The projections, published in the November 2026 edition of Petroleum Economist, present a production scenario in which neither of the country's two largest discoveries delivers first oil.

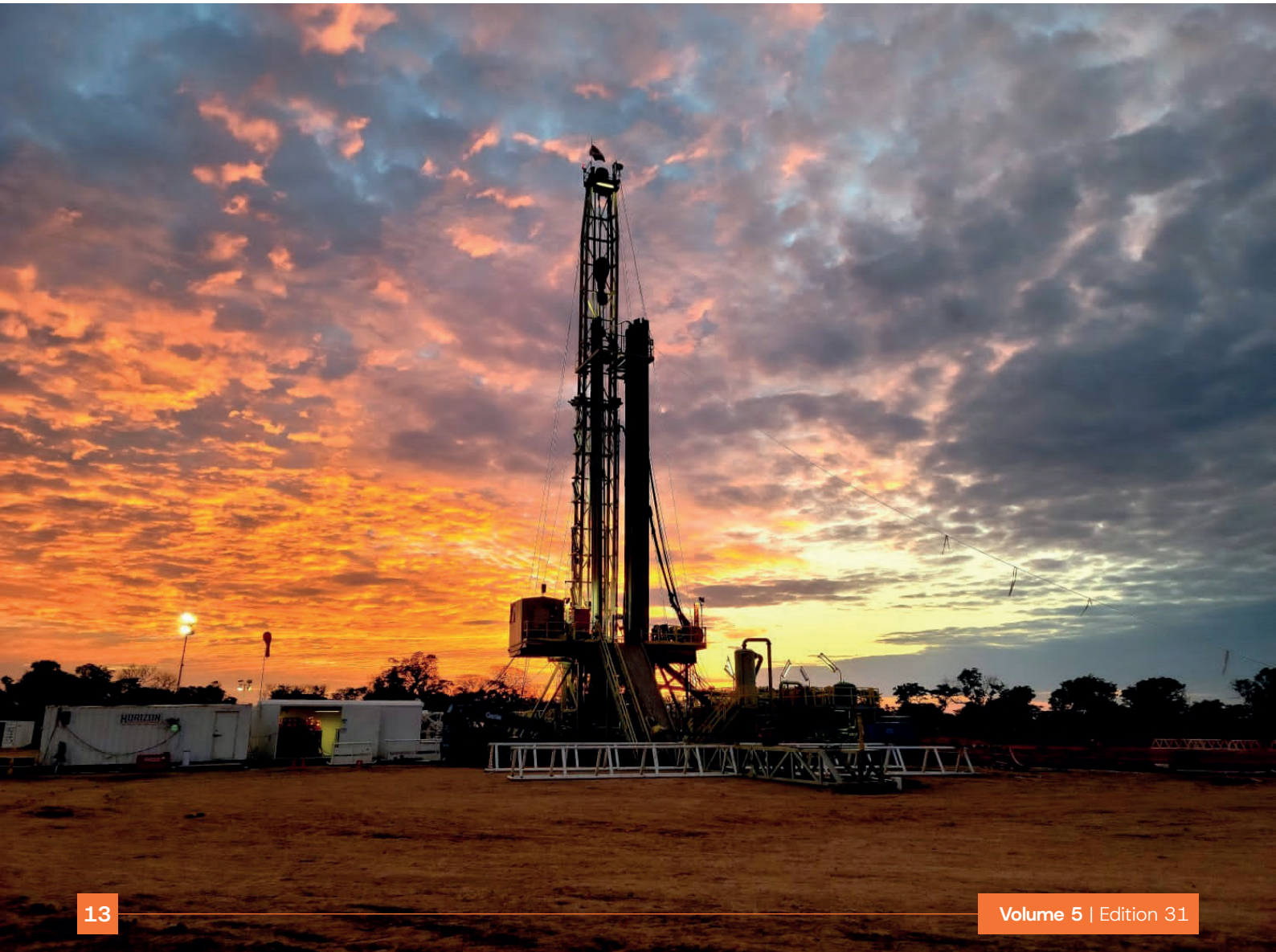
Instead, Rhino Resources' smaller Capricornus discovery could open Namibia's commercial oil industry.

At full projected production, Namibia could produce nearly 168 million barrels annually, equivalent to approximately 14 million barrels a month.

However, the country has yet to secure its first final investment decision on an offshore oil development.

From discoveries to production

Welligence estimates that



the Orange Basin contains discovered resources equivalent to 5.2 billion barrels of oil, comprising 3.3 billion barrels of liquids and 11.5 trillion cubic feet of natural gas.

More than 30 deepwater exploration and appraisal wells have been drilled since 2020, but not all discoveries are considered commercially viable.

The consultancy identifies three projects, situated in water depths of between 1,400 and 3,000 metres, as the basis of Namibia's projected oil production.

Together, Mopane, Venus and Capricornus account for an estimated 1.91 billion commercially recoverable barrels under Welligence's modelling.

These estimates are considerably more restrictive than the broader discovered-resource figures associated with the Orange Basin, illustrating the distinction between finding hydrocarbons and establishing commercially recoverable volumes.

Why Capricornus could produce first

The smaller Capricornus development is expected to benefit from lower gas-processing requirements and the possibility of deploying an existing production vessel rather than commissioning a new one.

This could shorten its development schedule relative to its larger competitors.

Welligence anticipates an investment decision on petroleum exploration licence 85 towards the end of 2027, with production starting in 2030.

The Capricornus-1A appraisal well, completed in June 2026, established connectivity with the original discovery. Rhino Resources and Azule Energy are also considering developing Capricornus alongside the neighbouring Volans gas-condensate discovery.

The significance of reservoir connectivity is that it helps operators determine how oil moves through underground formations and how development wells should be positioned.

The two larger developments

TotalEnergies would account for approximately 360,000 barrels of Namibia's projected daily oil production capacity through Venus and Mopane.

However, the engineering advantage of operating both projects does not remove the need to settle the fiscal and commercial arrangements governing their development.

Venus has progressed through front-end engineering and contractor bidding, but its earlier investment decision timetable has slipped.

Mopane remains at the appraisal stage, with further drilling required before the development configuration can be established.

The sequence of these developments means that delays at either TotalEnergies project could substantially alter Namibia's projected production profile.

The other side of 460,000 barrels

Namibia's production challenge extends beyond extracting crude oil.

The three discoveries contain significant volumes of associated natural gas, which must be separated from the oil and either utilised, transported or returned to the reservoirs.

The absence of established offshore gas-export infrastructure makes reinjection particularly important. It also introduces a competing consideration for Namibia, whose domestic electricity requirements could benefit from access to offshore gas.

Reinjecting gas and supplying it commercially to domestic consumers require different infrastructure and development arrangements.

The amount of gas requiring management will consequently influence the size of production vessels, their processing equipment and the time required to bring the discoveries into operation.

Not all discoveries are included

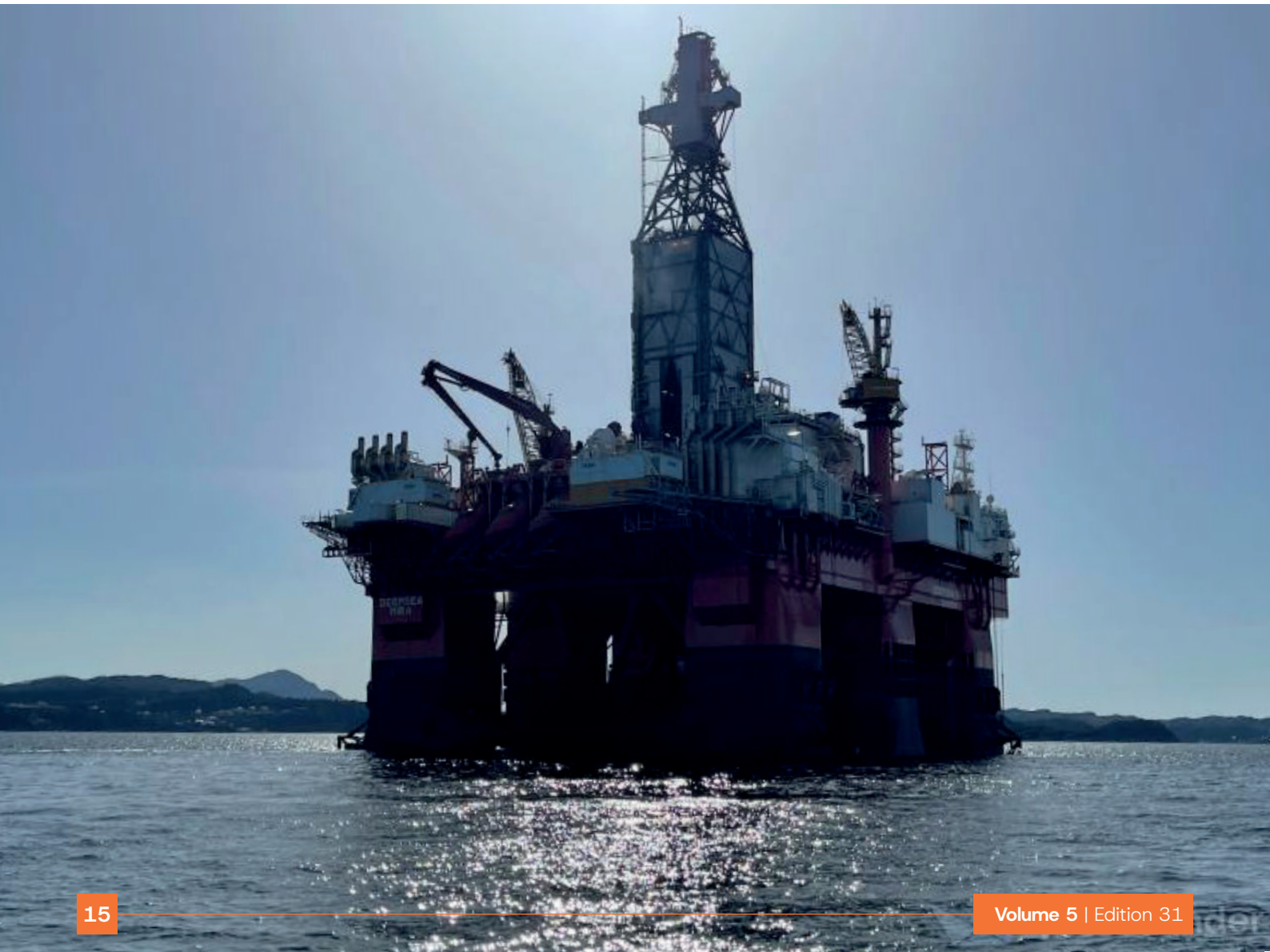
The 460,000-barrel projection excludes potential oil production from Shell's petroleum exploration licence 39, where substantial hydrocarbons have been discovered but a commercial development has yet to be established.

The significance of this exclusion is that Namibia's eventual production potential could extend beyond the three projects included in the forecast.

However, additional discoveries would need to demonstrate commercial viability before being incorporated into a credible national production outlook.

The immediate test for Namibia remains whether the operators can convert their existing discoveries into approved developments quickly enough to maintain the projected 2030 first-oil date.

The 460,000-barrel production represents an independent assessment of what Namibia could achieve if its three leading offshore projects proceed to commercial development.



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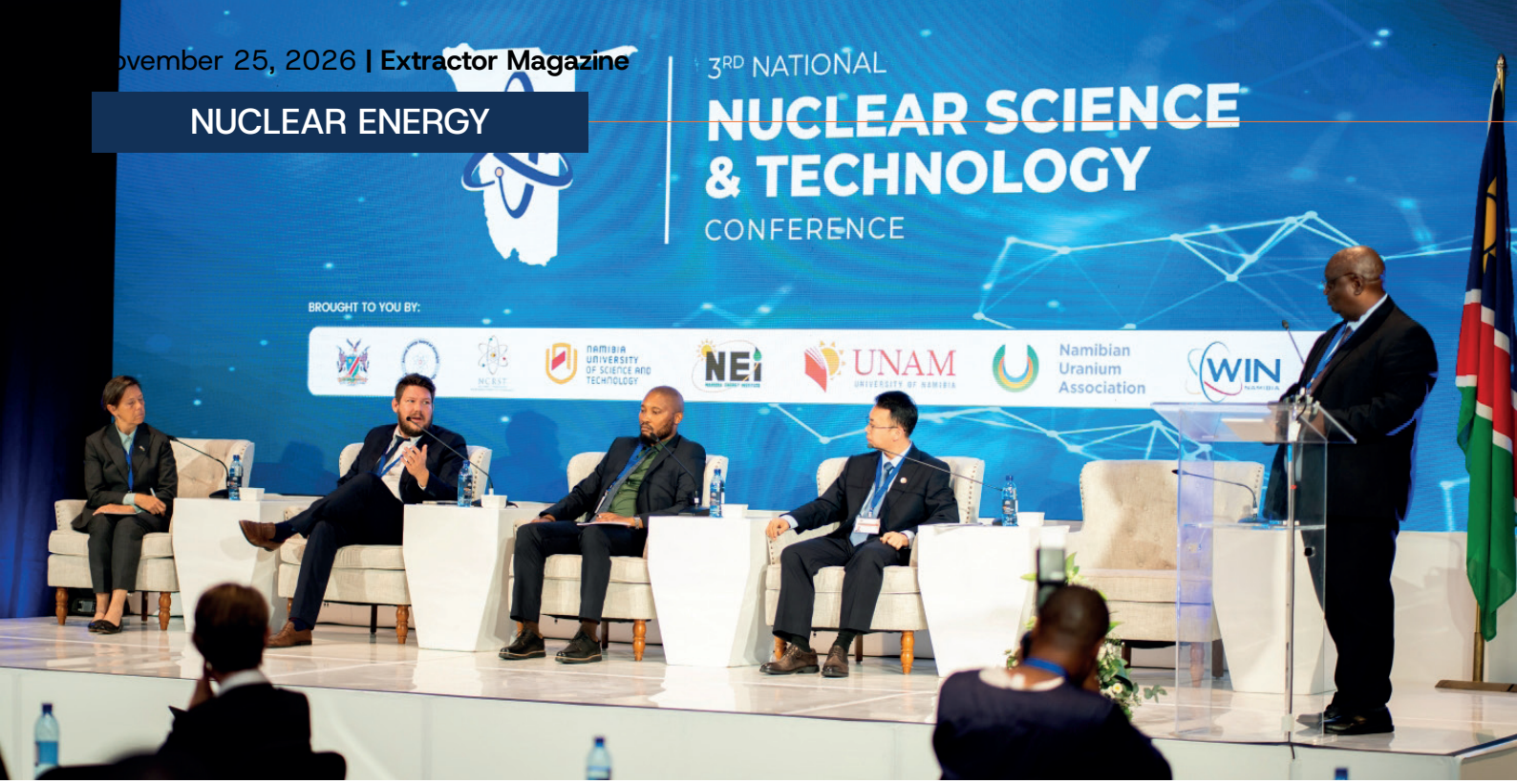
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Rosatom eyes long-term role in Namibia's nuclear industry

Russian nuclear energy company Rosatom has pledged long-term cooperation with Namibia to develop a domestic nuclear industry, introduce new technologies, create jobs and train local specialists.

Rosatom Central and Southern Africa chief executive Ryan Collyer identified the proposed US$500 million Wings uranium project in the Omaheke Region as part of this broader partnership.

"Rosatom is committed to long-term cooperation with Namibia. The country has significant potential to develop its own nuclear industry, create new industries and train the specialists who will shape its future," Collyer said.

"For us, the purpose of such a partnership is to help turn this potential into tangible results: new knowledge, technologies and jobs. The Wings project is part of this joint work. We want young Namibians to see their professional future in their own country and to be able to apply their talents here – in science, engineering and industry."

Collyer made the remarks at the third National Nuclear Science and Technology Conference, held in Swakopmund from 18 to 20 November 2026.

Organised by the Atomic Energy Board and the National Radiation Protection Authority, the conference brought together more than 200 representatives from government, business, scientific institutions and international organisations.

Discussions focused on nuclear industry development, skills training and the application of nuclear technologies in medicine, agriculture and industry.

Rosatom's commitment comes as Namibia begins implementing its Nuclear Industry Strategy, approved by Cabinet on 23 September 2025 and officially unveiled at the Swakopmund conference.

Prime Minister Elijah Ngurare, delivering an address on behalf of President Netumbo Nandi-Ndaitwah, outlined Namibia's ambitions to move beyond uranium extraction into uranium processing, nuclear electricity generation and medical radioisotope production.

The government expressed

its willingness to work with international partners, provided Namibian companies and entrepreneurs participate fully in these ventures.

Namibia has already commissioned a roadmap for a national nuclear power programme and established the Nuclear Energy Programme Implementing Organisation under the Office of the Prime Minister.

The government is also exploring the potential use of small modular reactors and microreactors for electricity generation, seawater desalination, green hydrogen production and industrial manufacturing.

The strategy provides for establishing the Nuclear Institute of Namibia, strengthening the regulatory framework and conducting feasibility studies for nuclear projects.

Under the Sixth National Development Plan, Namibia intends to train 100 people in nuclear science, establish a nuclear analytical laboratory and increase the industry's contribution to GDP from 3.2% to 4% by 2030.

On 23 November, an Atomic Energy Board delegation led by chairperson Shitaleni Herman briefed Nandi-Ndaitwah at State House on the strategy and potential projects to expand Namibia's participation in the nuclear fuel cycle.

Namibia is the world's third-largest uranium producer after Kazakhstan and Canada. According to the World Nuclear Association, the country produced 7 333 tonnes of uranium in 2024, accounting for approximately 12% of global mine production.

US$500 million uranium project

Rosatom's Wings project is operated by Headspring Investments, a subsidiary of Uranium One Group JSC, which forms part of Rosatom's corporate structure.

The proposed mining operation envisages producing approximately 3 000 tonnes of uranium annually using in-situ recovery technology.

Rosatom estimates that the project could create more than 600 direct jobs and up to 4 000 jobs in related industries, while contributing between 1% and 2% to Namibia's annual GDP growth.

The company says exploration has identified a deposit that ranks third in Namibia in terms of its mineral resource base, with the potential to become one of the world's largest new uranium deposits.

Rosatom maintains that the project is being implemented in accordance with Namibian legislation, using a science-based approach and specialised technical expertise.

Additional geophysical studies are underway at the project site to assess the proposed operation's safety and environmental parameters, following recommendations from International Atomic Energy Agency experts.

While Rosatom has expressed interest in long-term nuclear cooperation, its latest statement does not announce any agreements to establish uranium processing facilities or nuclear power stations in Namibia.

Rosatom is also supporting the development of local nuclear science and engineering skills through Headspring Investments.

Ahead of the conference, Headspring Investments sponsored a national schools competition in nuclear science and technology, attracting seven teams from across Namibia, including learners from the Omaheke Region.

Learners presented their ideas while exploring nuclear technology applications and career opportunities in science, engineering and environmental protection.

Headspring Investments deputy director Vanessa Bohitile encouraged learners to consider their future role in Namibia's nuclear industry.

"You should see yourselves not only as observers, but also as future scientists, engineers, researchers and innovators who will develop this industry," Bohitile told the learners.

GREEN HYDROGEN

Namibia entered CMMZE's global hydrogen network

Six years after establishing a green hydrogen company in Tunisia, Monaco-based shipping entrepreneur Aldo Labia has extended his renewable energy ambitions to Namibia, adding Henties Bay to an international portfolio spanning North Africa, southern Africa and the Middle East.

Compagnie Maritime Monégasque Zero Emission (CMMZE) represents Labia's transition from conventional maritime services to the production and transportation of green fuels for international markets.

The company's origins date back to 2012, when Labia established Compagnie Maritime Monégasque (CMM) in Monaco to provide maritime services to the oil, gas and renewable energy industries.

Eight years later, in 2020, CMM Zero Emission was established in Tunis, Tunisia, with the intention of developing renewable electricity generation, green hydrogen production, storage and maritime transportation infrastructure.

The business model extends beyond producing hydrogen. CMMZE intends to control several stages of the supply chain, from electricity generation and fuel manufacturing to transportation and delivery to international customers.

Building an international production network

By September 2024, CMMZE had announced plans to establish three large-scale green hydrogen production facilities in Tunisia, Morocco and the United Arab Emirates, with a combined annual production ambition of 180,000 tonnes of hydrogen for European markets.

The Tunisian development was planned around the port of Zarzis in the country's south-eastern region, where the company intends to install 250 MW of electrolyser capacity to produce 80 tonnes of green hydrogen daily.

The facility would require approximately 1.6 million megawatt-hours of electricity annually, supplied by solar



and wind developments at Nefetia Benguerdane and El Hamma.

In Morocco, CMMZE identified the Nador West Med port as its production and export location, with a proposed daily production capacity of 82 tonnes of hydrogen.

The Moroccan development envisages hydrogen production, liquefaction, storage and access to maritime infrastructure.

CMMZE also acquired a 5 MW pilot hydrogen production station for Abu Dhabi in June 2024, designed to produce two tonnes of hydrogen daily.

The three developments were initially expected to begin production in phases from 2027.

To support its expansion, CMMZE entered into a partnership with Peric Hydrogen Technologies and formed a consortium with solar technology company DAS Solar, envisaging up to 1,000 MW of renewable electricity generation capacity.

These partnerships reflected the company's ambition to combine maritime experience with renewable electricity generation and hydrogen manufacturing technology.

How Namibia entered the picture

While CMMZE was developing its North African and Middle Eastern portfolio, a green hydrogen development was already taking shape in Henties Bay.

The Namibian project's history dates back to late 2022, when the Henties Bay municipal council adopted a resolution concerning the proposed development.

In August 2024, the municipality publicly advertised its intention to lease 3,500 hectares to Chekai Investments, owned by Namibian businessman Harry Gonteb, for the establishment of a green hydrogen and ammonia production facility.

The proposed lease covered 30 years at a fixed monthly rental of N$50,000.

Namibia did not feature among the three production destinations identified in CMMZE's September 2024 international expansion announcement.

The Henties Bay development therefore appears to have originated as a locally initiated project before becoming incorporated into Labia's international energy portfolio.

By November 2025, a municipal land lease agreement had been concluded, while an environmental assessment notice published the following month identified Ugab Power Reserve as the project developer.

The environmental assessment proposed a 750 MW solar power plant, a 200 MW electrolyser, a desalination facility and infrastructure for green hydrogen and methanol manufacturing.

By November 2026, Ugab Power Reserve had been renamed CMMZE Energy Namibia, with ownership comprising Labia's CMMZE

Invest, Gonteb's Chekai Investments and Trevor Brockerhoff.

The precise date on which Labia entered the Namibian project, the financial terms of his participation and the circumstances surrounding the partnership have not been publicly established.

Namibia's place in the global portfolio

CMMZE's corporate website now identifies Namibia and South Africa alongside Tunisia, Morocco and the United Arab Emirates among its project locations.

Interestingly, the website describes the Namibian development as a Windhoek–based hydrogen value chain incorporating solar and wind generation, 250 MW of electrolyser capacity and daily hydrogen production of 80 tonnes.

Those specifications differ considerably from the Henties Bay development announced in November 2026.

It remains unclear whether the Windhoek proposal represents an earlier configuration, a separate development or outdated corporate information. The Henties Bay facility is designed to produce approximately 35,000 tonnes of green hydrogen annually for conversion into 210,000 tonnes of green ammonia.

Unlike the North African proposals, which are centred on established commercial ports, the Henties Bay development envisages constructing dedicated offshore loading infrastructure.

The Namibian development would consequently combine electricity generation, hydrogen manufacturing, ammonia conversion, storage and direct maritime exports within a single industrial operation.

Shipping at the centre of the business

The maritime component distinguishes CMMZE's development strategy from that of companies concentrating exclusively on renewable electricity generation or hydrogen production.

Labia's shipping background provides the commercial foundation for the company's proposed international supply



chain.

Its Tunisian operation would use Zarzis as an export gateway, while the Moroccan facility would operate through Nador West Med.

In Namibia, the company intends to establish a floating offshore jetty connected by pipeline to its ammonia production and storage facility.

Brockerhoff told Namibian Sun on 4 November 2026 that the company had ordered ammonia carriers expected to be commissioned in 2028.

He also indicated that development expenditure had so far been funded internally, with Labia facilitating project financing.

The strategy potentially gives CMMZE greater control over the movement of its products between production facilities and international customers.

Namibian Sun

The southern African expansion

Namibia's incorporation into CMMZE's international portfolio extends the company's production ambitions considerably beyond its original North African and Middle Eastern geographical focus.

Its corporate website also identifies Pretoria in South Africa as a prospective development location, suggesting that Henties Bay may form part of a broader southern African expansion rather than an isolated investment.

The company's intended European customer base remains consistent across its international projects.

However, the Henties Bay facility offers a different production and export configuration from the developments initially announced in 2024.

CMMZE announced in November 2026 that the Namibian project had reached construction readiness following its reported final investment decision in September.

Construction of the N$17 billion facility is scheduled to begin in 2027, with commercial production and exports planned for 2030.





The Extractor
Mining, Energy, Construction and Logistics

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