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China's Strategic Resource Diplomacy in South Africa's Mining Sector: Economic Statecraft, Global Value Chains, and the Politics of Mineral Dependency

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ABSTRACT

This article examines China's expanding influence in South Africa's mining sector through the framework of International Political Economy (IPE), economic statecraft, and asymmetric interdependence. It argues that Chinese engagement in South Africa's mineral economy extends beyond conventional foreign direct investment and constitutes a broader strategy that links resource security, infrastructure development, and integration into global value chains. Using a qualitative case study methodology, the article analyses Chinese investment mechanisms, including acquisitions, joint ventures, state-supported financing, and resource-linked infrastructure projects. The study finds that Chinese participation has contributed to investment inflows, industrial cooperation, and expanded market access, while also sparking debates about dependency, value-chain positioning, and economic sovereignty. The article contributes to China–South Africa scholarship by demonstrating how mineral investment serves as a strategic instrument in global competition for economic power. The findings indicate that Chinese influence in South Africa's mining sector has been established through a set of integrated mechanisms, including foreign direct investment (FDI), targeted development financing, productive partnerships, and integration into global value chains. While this expansion has enhanced the sector's productive capacity and attracted investment inflows, it has also reinforced certain patterns of external dependency, maintaining South Africa's role primarily as a supplier of raw materials within global value chains. Furthermore, the study demonstrates that this growing influence carries significant geopolitical dimensions amid intensifying international competition over strategic mineral resources, positioning the Republic of South Africa's mining sector as an imperative arena for the reconfiguration of global economic power. The study concludes that managing this influence by adopting more balanced national policies that strengthen economic governance, promote technology transfer, and reduce excessive dependence on specific markets, thereby maximizing the developmental benefits of foreign investment in the mining sector.

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1. Introduction

China–South Africa relations have evolved into one of the most significant economic partnerships between China and Africa. South Africa's mineral wealth and strategic position in global supply chains have made its mining sector a central arena of international economic competition [1]. In 2002, an exhibition at South Africa's parliament included a reproduction of the Da Ming Hunyi Tu (Amalgamated map of the Great Ming), citing it as the earliest world map to depict the entire African continent [2]. In line with the Belt and Road Initiative, the PRC formally presented a replica of this map to the South African government as a gift in conjunction with the exhibition[3]. The map gained the value of veneration across South Africa. In particular, the map was a historically intertwined with the legacy of Zheng He's diplomatic expeditions, which reached the East African coast in the early 1400s. The depiction of Africa in the Da Ming Hunyi Tu is clearly derived from non-Chinese sources that predate Zheng He's expeditions, and is a clear-cut testimony to the ancient trade ties between South Africa and China[4]. China–South Africa relations present a paradox of economic and political partnership between China and African states, with official diplomatic relations established in 1998 following the end of the apartheid era[5]. Hitherto, a bilateral partnership was announced in 2000, followed by the establishment of a strategic partnership in 2004 and the evolution into a Comprehensive Strategic Partnership in 2010 [6]. In 2009, China became South Africa's largest trading partner, with bilateral trade reaching US$14.1 billion[7].

Hitherto, China has emerged as South Africa's leading trading partner, strengthening its position within regional supply chains and securing mining contracts across Sub-Saharan Africa. Currently, China accounts for approximately 58% of global rare earth mineral production and serves as the principal importer of African minerals. In 2019, mineral exports from Sub-Saharan Africa to China amounted to US$10 billion[8]. Bilateral trade between China and South Africa increased to approximately US$54 billion in 2021, representing around 21% of China's total trade with the African continent. At the same time, Chinese investment in South Africa expanded significantly, reaching an estimated US$25 billion, primarily directed toward strategic sectors that support economic development and deepen economic integration between the two countries. Consequently, South Africa has consolidated its position as one of China's most imperative investment and trade gateways in Africa[9].

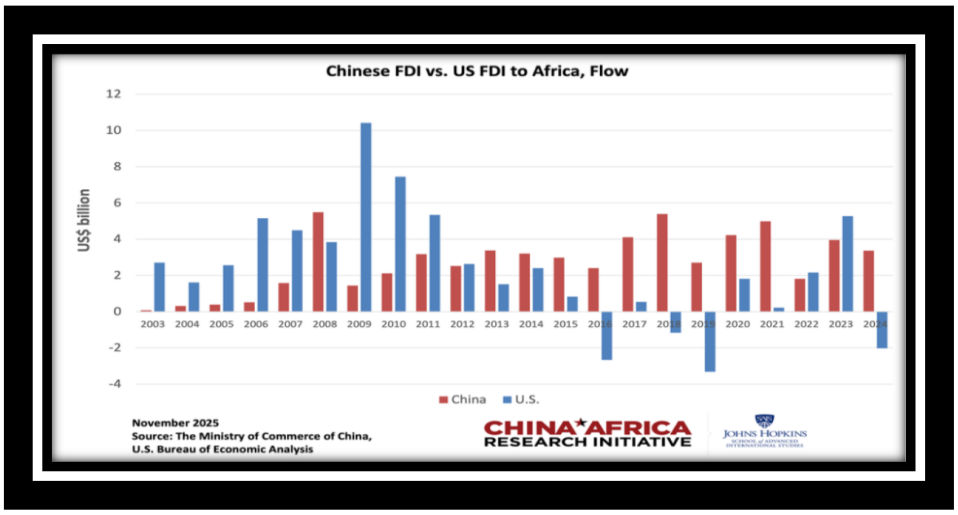
The mining sector in Africa—particularly in South Africa—is one of the most significant arenas of China's expanding influence, owing to the continent's vast mineral wealth, including gold, platinum, chromium, coal, and rare minerals essential to modern industries and global supply chains. Furthermore, Africa possesses over 60% of the world's uncultivated arable land and approximately 30% of the world's ten most strategically imperative minerals[10]. China emerged as the largest investor in South Africa, especially in the mining sector, reflecting its growing dependence on the country's abundant natural resources to support its industrial development and long-term resource security strategy [11].

Fig (1): Top 10 African Nations With Most Mineral Deposits

Prepared by the researcher based on data from the table [12].

In this context, the Chinese presence has not been limited to traditional investment activities, albeit taken more complex forms, including acquisitions, joint ventures, and financing of infrastructure projects linked to the mining sector. These mechanisms have enabled China to further expand its economic influence within this strategic industry. Consequently, this deepening engagement has raised multiple questions about the nature, scope, and instruments of this influence, as well as its implications for the South African economy, particularly regarding growth opportunities and challenges related to economic sovereignty and natural resource governance. In this regard, China ranked first globally in 2024 mineral product imports, with total imports of approximately USD 695 billion, according to the Observatory of Economic Complexity (OEC) [13].

Fig (2) Chinese FDI vs US FDI to Africa



Source [14].

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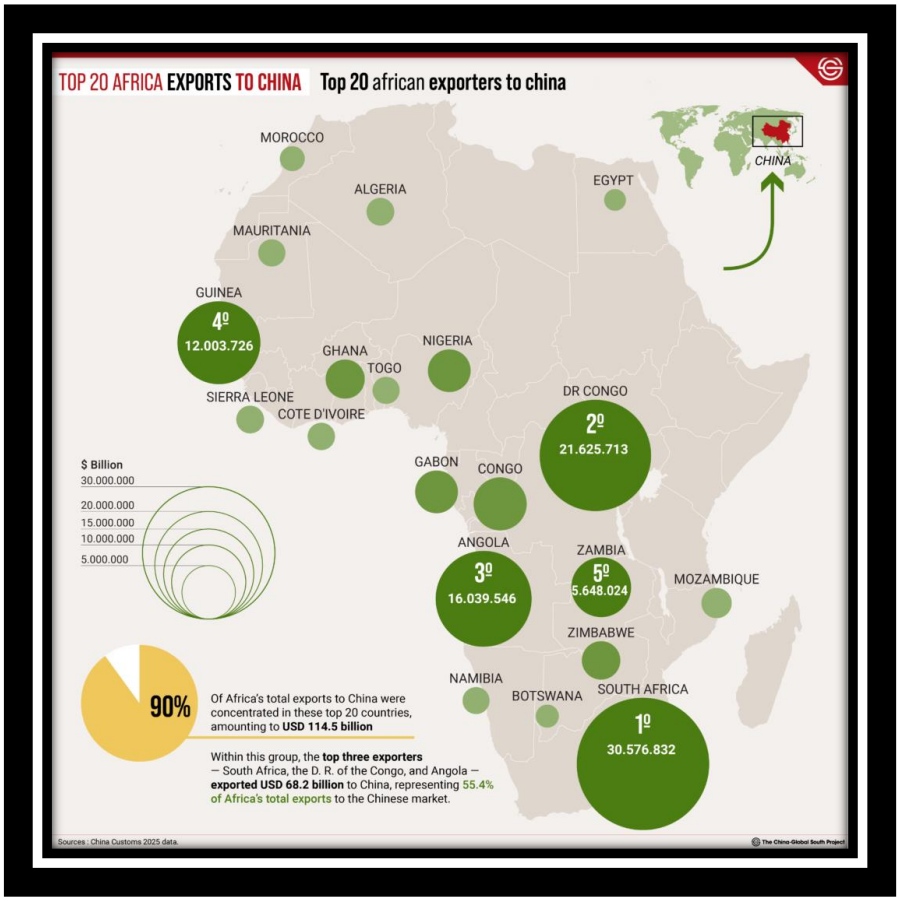
Chinese foreign direct investment (FDI) flows to Africa have grown gradually since 2003; however, their overall volume has remained limited compared with Chinese investments in other regions of the world. Despite this expansion, the African continent still accounts for a relatively modest share of China's total outward investment. In 2024, Chinese FDI flows to Africa reached approximately USD 3.37 billion, compared to around USD 320 million two decades earlier, reflecting substantial long-term growth. However, these flows declined by 15% compared to 2023. The highest level of Chinese investment in Africa was recorded in 2008, at USD 5.5 billion, driven by the Industrial and Commercial Bank of China's acquisition of a 20% stake in South Africa's Standard Bank. In contrast, U.S. FDI flows to Africa in 2024 recorded a negative value of USD -2.02 billion, indicating that capital withdrawals or repatriations exceeded new investment inflows. This followed 2023, when U.S. investment surpassed Chinese investment in Africa for the first time in a decade.

In terms of geographic distribution of Chinese investments in 2024, South Africa ranked first among recipient countries, followed by Mozambique, Niger, Algeria, and Mauritius. Meanwhile, U.S. investments were primarily concentrated in South Africa, Seychelles, and Mauritius. It is worth noting that the United States does not disclose FDI flow data for 11 African countries to protect the confidentiality of investing firms and prevent the identification of firm-level data.

Fig (3) Top 20 Africa Exports To China



Source: [15].

In 2025, the bulk of China–Africa trade was concentrated in a limited number of countries, with 20 African states accounting for approximately 90% of Africa's exports to China, valued at USD 114.5 billion. This group was led by South Africa, the Democratic Republic of the Congo, and Angola, with the latter alone accounting for more than half of these exports (55.4%) [16]. The total trade volume between the two sides reached USD 348 billion, marking a 17.7% increase compared to 2024, while the trade balance remained strongly in China's favor. Chinese exports to Africa amounted to USD 225 billion, compared to USD 123 billion in African exports to China, reflecting a widening structural trade imbalance[17].

Furthermore, Chinese investments in selected regions of the African continent have been highly concentrated, with shares ranging from 80% to 90–100%, with a clear geographic focus in West, Central, and Southern Africa[18]. In West Africa, Niger and Sierra Leone emerged as the main beneficiary countries, recording shares of up to 100% in certain Chinese deals. Neighboring countries such as Nigeria, Chad, and Cameroon also registered high levels of engagement, reaching approximately 97%. In the Horn of Africa and Central Africa, Ethiopia and the Democratic Republic of the Congo captured around 99% of such investments, while Angola and South Africa ranged between 92% and 100%[19]. This distribution also reflects the expanding scope of Chinese economic and political influence, with acceptance indicators exceeding 80% in some Sahel countries in West Africa (highlighted in dark green). Similar patterns are observed in other regions of Southern West Africa, where support or positive perceptions of China range between 61–80% and 71–80% along the southern coastline, with comparable indicators in Southern Africa[20].

China dominates the global rare earth elements market, producing approximately 60% of global output and processing nearly 80% of it, making it the leading actor in the supply chain. Major economies such as the United States (80%) and the European Union (98%) are highly dependent on Chinese imports[21]. Hitherto, some of these investments have sparked extensive debate over the financing models employed, particularly those based on resource-for-infrastructure exchanges, in which African countries receive Chinese loans and development financing for infrastructure projects in return for export guarantees tied to minerals and raw materials to China. Despite the controversy surrounding this model, Chinese economic presence in Africa is not limited to large state-led projects; it also extends to thousands of small and medium-sized Chinese firms operating in industry, trade, services, agriculture, and technology. This reflects the diversity of Chinese investments and the depth of their impact across various sectors of African economies, further strengthening economic relations between the two sides [22].

The significance of this study lies in its focus on one of the most prominent dimensions of geopolitical and economic competition in the African continent, where economic interests intersect with strategic considerations amid China's rising role as a global economic power seeking to secure raw material supplies and strengthen its presence in emerging markets. The study also seeks to analyze the mechanisms employed by Chinese companies to expand their presence in South Africa's mining sector and to understand the nature of interactions between local and international actors in this field. Accordingly, this study aims to analyze Chinese influence in South Africa's mining sector by examining the dominance of Chinese companies and the mechanisms of economic

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penetration, and by exploring its various dimensions and implications for the country's economic and political structure.

1. Theoretical Framework

The study applies International Political Economy, economic statecraft, asymmetric interdependence theory, and debates on resource dependency to explain the mechanisms through which economic influence is constructed. This research is based on a set of theoretical approaches within the fields of International Relations and International Political Economy that explain patterns of economic penetration by major powers into foreign markets, particularly in developing countries rich in natural resources. Economic influence has become one of the most prominent tools of power in the contemporary international system, where power is no longer measured solely by military capabilities but also by the ability to exert influence through investment, trade, supply chains, and control over strategic resources. In this context, the study relies on the concept of economic power as a key analytical framework, defined as the ability of a state or its affiliated actors (such as multinational corporations) to influence another state's economy through market instruments, investment, and technology. Chinese companies, especially state-owned or state-supported enterprises, are of particular importance in this framework, as they function as indirect instruments of China's foreign economic policy, reflecting the intertwining of economics and geostrategy.

The study also employs the International Political Economy approach, which focuses on the reciprocal relationship between the state and the market and on how foreign investment is used to enhance political and economic influence. According to this approach, Chinese investments in South Africa's mining sector are not understood as purely economic decisions but rather as part of a broader strategy to secure China's critical natural resources and ensure the stability of supply chains for heavy and technological industries. The study further draws on aspects of the concept of economic neo-colonialism, which refers to indirect forms of economic control exercised by major powers through investment, debt, and infrastructure, without the need for direct political or military presence. From this perspective, Chinese penetration into the mining sector can be analyzed either as a means of reproducing economic dependency or as a model of developmental cooperation aligned with a distinct Chinese approach, distinct from traditional Western models.

In addition, the study benefits from the literature on asymmetric interdependence theory, which holds that economic relations between states are often unbalanced, with stronger economic actors benefiting more from market interconnections than weaker ones. This helps explain how foreign investment can become an indirect tool of influence over national economic decision-making in host countries. Based on these theoretical approaches, this research seeks to analyze Chinese influence in the mining sector in South Africa not merely as an investment phenomenon, but as an integrated system of economic, political, and strategic relations, where corporate interests intersect with Chinese state policies, within a global context characterized by intensifying competition over natural resources and the reconfiguration of global economic power structures.

2. Methodology

The research adopts a qualitative case study approach focusing on South Africa. Data are drawn from academic literature, institutional reports, investment data, and sectoral studies. This study relies on a research methodology primarily based on the descriptive-analytical approach, given its suitability to the topic, which addresses the phenomenon of Chinese economic influence in South Africa's mining sector. This approach aims to describe the reality of Chinese investments and companies in the sector, analyze their dimensions, and interpret the mechanisms of economic penetration and the resulting economic and political implications.

The study also employs a case study approach, with South Africa as an appropriate case for analyzing Chinese penetration in the mining sector, as it is one of the most important African countries rich in natural resources. In addition, it has a relatively advanced economic and industrial structure compared to other countries on the continent, making it a fertile environment for international investment interaction.

The study further relies on the comparative analytical approach in some sections, by comparing patterns of Chinese investment in the mining sector with those of other international powers. This is done to highlight the specificity of the Chinese model in terms of tools, mechanisms, and strategic objectives.

At the level of data collection tools, the study relies on secondary sources, including books, peer-reviewed academic studies, reports from international institutions such as the World Bank and the International Monetary Fund, reports from companies operating in the mining sector, and specialized articles in international political economy. Statistical data on investment and trade volumes in South Africa's mining sector are also utilized.

In terms of data analysis, the study adopts a qualitative approach to understand the nature of influence and its mechanisms, alongside quantitative analysis of available statistical data, which allows for a more comprehensive and accurate reading of Chinese economic penetration.

Based on this methodology, the study seeks to provide an integrated scientific understanding of the mechanisms of Chinese corporate control in South Africa's mining sector and to interpret the implications of this influence in both regional and international contexts.

The researchers in this study faced numerous obstacles due to significant difficulty in obtaining accurate and reliable information from official sources. Previous studies were also found to be extremely limited and, in many cases, appeared to have deliberately or unintentionally neglected this topic, possibly due to researchers' frustration in obtaining sufficient data to support their work.

Despite the researchers' efforts in this study to contact dozens of individuals working in official bodies, Chinese companies, and mining institutions, as well as numerous scientific bodies and governmental and private institutions in both China and

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South Africa, the prevailing response was either no reply or claims of a lack of available data, as if there were a deliberate lack of transparency surrounding the issue.

It was also found that several studies adopted a critical stance toward China in their content, with one study even including cartoons portraying China as a "pig," along with other illustrations depicting China, its companies, workers, and employees in Africa in a negative or "evil" manner. The study referred to is:

Kohnert, Dirk, *Prospects and Challenges for the Export of Rare Earths From Sub-Saharan Africa to the EU* (January 8, 2024). Available at SSRN: https://ssrn.com/abstract=4687731 or http://dx.doi.org/10.2139/10.2139/ssrn.4687731

The researchers also attempted to contact various governmental and private entities to obtain a list of Chinese companies operating in South Africa. Still, they concluded that this was nearly impossible due to the complexity and opacity surrounding such information. As a result, a limited number of company names were collected, as included in the table within the study.

Table (1) Data were also drawn from a wide range of websites, including:

1. The Observatory of Economic Complexity (OEC)
2. World Mining Data,
3. British Geological Survey
4. US Geological Survey
5. United Nations Economic Commission for Africa (ECA)
6. World Resources Institute

3. Chinese Economic Influence in South Africa's Mining Sector

China's rise as a major industrial power has played a decisive role in reshaping its strategic priorities, making the securing of natural resources—especially strategic minerals and industrial raw materials—a central component of its long-term economic security[23]. According to recent estimates, nearly half of the countries. China's total outward investment between 2005 and 2016 was directed toward the energy and mining sectors abroad[24].

At the infrastructure level, this sector represents one of the most significant areas of Chinese investment presence in Africa, including Southern African countries. Estimates indicate that Chinese companies account for a substantial share of infrastructure contracts awarded to African countries and public service projects. This presence is characterized by strong competitiveness, relying on integrated financing packages that include concessional loans, targeted funding, and execution by Chinese firms, thereby making Chinese firms key actors in major development projects across the continent[25].

Institutional bilateral initiatives, most notably the Forum on China–Africa Cooperation (FOCAC), established in 2000, have also helped strengthen the political and

regulatory framework for this expansion by providing a platform for economic and diplomatic coordination between the two sides. The forum has facilitated multiple forms of cooperation, including debt restructuring, expanded training and capacity-building programs, and scholarships for African students, reflecting a Chinese approach that integrates developmental and strategic dimensions simultaneously[26].

In hindsight, Chinese investments in South Africa and across Africa should not be understood as isolated capital flows but rather as part of an integrated economic system linking infrastructure development to natural resource security, within a long-term strategy aimed at enhancing China's economic influence and reshaping its position in the global economy[27]. The Chinese investment model in Southern Africa and the broader African continent is characterized by a degree of specificity that distinguishes it from traditional Western investment patterns. It does not rely solely on direct financial flows but often combines concessional financing, development assistance, and targeted investments, linking access to natural resources with integrated infrastructure and financing packages. This approach reflects what may be described as an *"integrated Chinese model of external economic cooperation,"* which combines commercial, developmental, and strategic dimensions simultaneously[28].

In this context, economic relations between China and African countries are not based solely on direct monetary exchange for resources but, in some cases, take more complex forms, involving resource-for-development exchanges. These arrangements link infrastructure, such as roads, ports, airports, and energy networks. This strengthens the integration of resource exploitation with domestic development processes in host countries while simultaneously consolidating the presence of Chinese firms across multiple stages of project implementation[29].

The Chinese presence in the infrastructure sector is evident in the diversity of its modes of engagement, which extend beyond direct investment to include participation in large-scale contracting projects, the provision of concessional loans, and the implementation of development assistance projects. Within this context, Chinese telecommunications companies, such as Huawei and ZTE, have played a pivotal role in expanding Chinese investment in digital infrastructure and developing communication networks in several African countries[30]. Investors are involved in hundreds of projects in agriculture, education, and health, reflecting the comprehensive nature of Chinese investment engagement across the African continent[31].

Between 2005 and 2015, several African countries—particularly in Southern, Eastern, and Western Africa—emerged as key destinations for major Chinese contracting firms. Countries such as Angola, Nigeria, Ethiopia, and Equatorial Guinea accounted for a significant share of implemented projects, largely due to their strong linkages with oil, natural resources, and strategic infrastructure sectors. This positioned them as key nodes in China's broader economic expansion across the continent[32]. At the sectoral level, statistical data indicate that Chinese investments in Africa are concentrated in a limited number of key sectors, with construction accounting for the largest share, followed by mining, manufacturing, financial services, and leasing and business services. This distribution reflects a relative concentration of Chinese investments in strategic, capital-intensive sectors, particularly those linked to infrastructure development and natural

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resource extraction. Notably, precious metals account for approximately 85% of South Africa's exports to China [33].

Thus, it becomes evident that Chinese investments in Africa continue to exhibit a relatively concentrated sectoral pattern, linking China's economic demand for natural resources with infrastructure development in African countries. This reflects an intertwined investment-development model that combines economic interests with the strengthening of strategic influence, while also maintaining potential for future expansion toward more diversified sectors and deeper integration into local African economies[34].

Table 2: Chinese FDI flows in South Africa, 2003-2011

(Million of USD, per cent)

1. Year	2. 2003	3. 2005	4. 2007	5. 2008	6. 2009	7. 2010	8. 2011
9. China's FDI flows in South Africa	10. 8.9	11. 47.5	12. 454.4	13. 4,807.9	14. 41.6	15. 411.2	16. -14.2
17. FDI inflows in South Africa	18. 7.34	19. 6.647	20. 5,695	21. 9,006	22. 5,365	23. 1,228	24. 5,807
25. Proportion of China's FDI flows in South Africa to FDI inflows in South Africa	26. 1.2	27. 0.7	28. 8.0	29. 53.4	30. 0.7	31. 33.5	32. -

Source:[1]

4. Critical Discussion

The Chinese role presents both developmental opportunities and structural challenges. While investment supports economic activity, concerns remain about dependence, raw-material export patterns, and local value creation. Within this context, China's external economic policy has adopted a more outward-looking approach to

[1] HUANG Meibo, REN Peiqiang,October 2013. A STUDY ON THE EMPLOYMENT EFFECT OF CHINESE INVESTMENT IN SOUTH AFRICA, Discussion Paper, Stellenbosch university, p10. link: https://scholar.sun.ac.za/server/api/core/bitstreams/173b1cbe-513d-4e81-8d95-764eb3acb458/content

overseas investment, particularly since the beginning of the twenty-first century, with the launch of the **"Going Global" strategy**[36].

Hitherto, South Africa, in particular, has emerged as a strategic investment destination due to its abundant mineral resources and integral role in global mineral supply chains. As one of the continent's most industrially advanced economies, South Africa offers a relatively stable institutional environment and well-developed infrastructure compared to many other African countries, making it an attractive destination for strategic foreign investment. Since global demand for critical minerals increased, particularly those essential for heavy industries, advanced technologies, and renewable energy, the Chinese presence in South Africa's mining sector expanded through multiple channels that extended beyond direct investment to the restructuring of production relationships within the industry. These channels included the partial acquisition of stakes in local mining companies, the establishment of joint ventures, and the financing of extraction projects together with transport, energy, and logistics infrastructure associated with mining operations[37].

From an analytical perspective, this expansion can be understood as a transition from a traditional investment model to a more sophisticated model of **integration into global value chains**. Chinese companies are no longer merely acquiring mining assets; they increasingly seek to influence multiple stages of the production cycle, including extraction, primary processing, transportation, and export. This transformation reflects a strategic objective of reducing dependence on intermediary markets while strengthening control over the flow of critical raw materials. Chinese financial instruments—particularly concessional loans and long-term investment arrangements—have also been enhanced in the sector by linking financing to infrastructure and mining projects. This approach has enabled them to establish long-term economic relationships with local stakeholders. At the same time, this financing model has generated varying degrees of interdependence, which, according to the literature on international political economy, may exhibit asymmetrical characteristics in certain cases. Accordingly, the evolution of Chinese influence in South Africa's mining sector reflects China's transformation from an emerging economic actor into a structural actor within global supply chains[38]. In this context, investment in natural resources serves as a strategic instrument to reshape China's position in the global economy and strengthen its capacity to influence international mineral markets, amid intensifying geo-economic competition over strategic resources and the ongoing redistribution of global economic power.

5. Findings and Contribution

The study demonstrates that Chinese engagement in mining represents a form of strategic economic integration in which commercial interests and geopolitical objectives intersect. The findings allow for the deduction of general patterns applicable to South Africa and peer economies, some of which are benchmarked throughout the book for comparative insights. **Tools and Mechanisms of Chinese Economic Penetration in South Africa's Mining Sector.** This pattern of Chinese expansion in Africa, particularly in Southern Africa, cannot be understood merely as a traditional drive to secure natural resources. Rather, it goes beyond that toward adopting a long-term strategic approach

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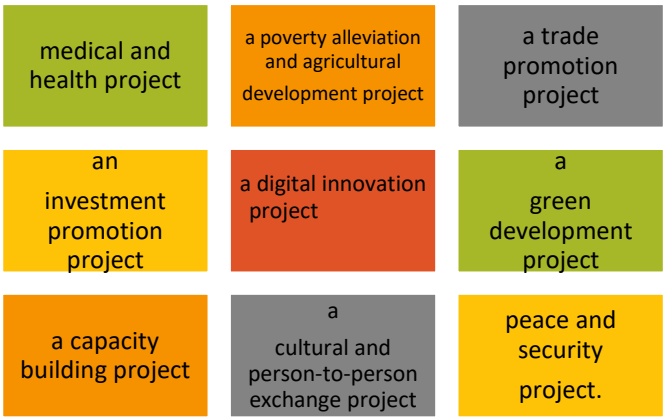
characterized by institutional planning and structural integration into local economies. China has not relied solely on purchasing resources from global markets; instead, it has worked to build extensive networks of economic and political relations to ensure stable, direct access to strategic resources, reflecting a paradigm shift in the logic of engagement from *"commercial transactions"* to *"long-term structural partnerships"* [39].

Within this framework, the **Forum on China–Africa Cooperation (FOCAC)**, established in Beijing in 2000, has played a pivotal role in institutionalizing China–Africa relations. The forum has not remained a traditional diplomatic framework; rather, it has evolved into the main institutional mechanism through which cooperation priorities are set, joint economic agendas are formulated, and major financing and investment packages for the continent are announced. It also provides a periodic platform that brings together heads of state and senior officials, giving it significant political and institutional weight, thereby enhancing continuity and cumulative cooperation between the two sides[40].

The number of Chinese companies operating in Africa is estimated at 10,000[41]. Chinese companies such as **China Moly**, **Zijin**, **Minmetals**, and a few others. Up firms control around 30% of Africa's copper production[42], and up to 50% of its cobalt production through their strong presence in the **Democratic Republic of the Congo** and **Zambia**[43]. Through this institutional framework, China has introduced a distinctive model of development cooperation that integrates trade, investment, and development assistance into a single package. In economic and political literature, this model is sometimes referred to as the ***"Angola Model,"*** where large or concessional loans are provided to finance major infrastructure projects such as roads, bridges, ports, and hospitals. At the same time, Chinese companies are responsible for implementing these projects almost entirely, in exchange for securing loan repayment through revenues from natural resource exports[44]. Accordingly, it is imperative to recall the statement made by Chinese President Xi Jinping at the opening ceremony of the Eighth Ministerial Conference of the Forum on China–Africa Cooperation in 2021, in which he emphasized that China would work on implementing its nine projects in South Africa, as explained in the table below[45]:

Fig (4) China's Nine Cooperation Initiatives in Africa as Announced by President Xi Jinping during the 2021 Forum on China–Africa Cooperation (FOCAC).



The previous projects illustrate the mechanisms China employs to exert influence over South Africa's resources (soft power). The Chinese president also emphasized the

need to strengthen cooperation in key areas, including the maritime economy, productive capacity, energy, trade, and investment, and to promote balanced, sustainable development of bilateral trade[46]. This model reflects a high degree of interconnection among financing, implementation, and resource security, in which loans are not viewed as isolated financial flows but as part of an integrated economic system linking development needs in African countries with China's strategic interests in securing raw materials. This approach has enabled African countries, including those in Southern Africa, to implement large-scale infrastructure projects within a relatively short period, without full reliance on the conditions of traditional international financial institutions, which are often associated with strict economic and political reform requirements[47]. However, despite its developmental appeal, this model also raises concerns about long-term financial dependence, the restructuring of debt patterns, and the limits of sovereignty over economic decision-making in recipient countries. Consequently, the Chinese approach can be seen as a hybrid model that combines development, financing, and strategic considerations within a framework that reshapes economic relations between China and Africa on more complex and interwoven foundations than traditional models of international cooperation[48].

Chinese economic penetration in South Africa's mining sector is characterized by a complex structural nature, relying on an integrated system of economic, financial, and institutional tools, reflecting a form of "institutionalized economic power" exercised by China through the interconnection of the state, the market, and enterprises. This penetration cannot be understood as the result of isolated investment decisions, but rather as the outcome of a long-term external economic strategy aimed at strengthening control over natural resources and reshaping China's position within global mineral value chains[49]. Contextually, foreign direct investment is one of the most important practical channels of entry into the mining sector, as Chinese companies—particularly state-owned or state-affiliated firms—tend to acquire partial or full stakes in South African mining assets or enter into joint development projects. This form of investment allows China not only to own productive assets but also to influence the corporate governance of target companies, including decisions related to production, expansion, pricing, and exports. This enhances its ability to penetrate the sector's internal structure rather than merely engage in external trade relations [50].

President of the South Africa-China Economic and Trade Association Mr. Wang Wen'an: South Africa has been China's top African trading

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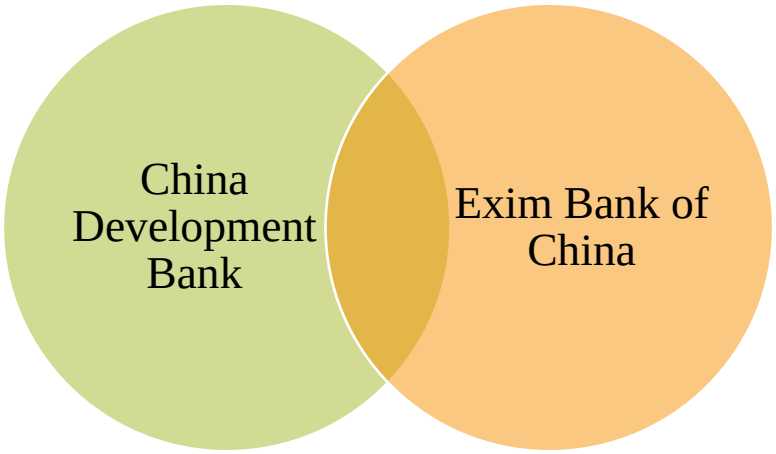
partner for 12 consecutive years, while China has maintained its position as South Africa's largest trading partner for 13 consecutive years[51].

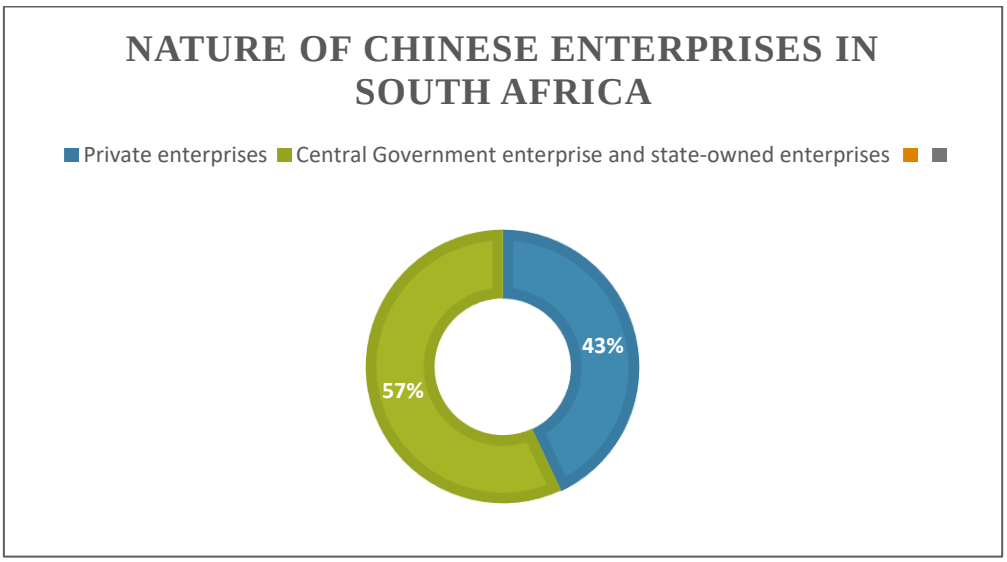
President of the South Africa-China Economic and Trade Association, Mr. Wang Wen'an: South Africa has been China's top African trading partner for 12 consecutive years, while China has maintained its position as South Africa's largest trading partner for 13 consecutive years[52]. Additionally, state-supported development finance represents a central instrument in China's strategy of influence, as major financial institutions such as the China Development Bank and the Export–Import Bank of China play a pivotal role in financing mining projects and related infrastructure. This financing is often linked to strategic conditions, such as the use of Chinese companies in project implementation or the tying of funding to resource export arrangements. This creates a pattern of long-term financial dependence and strengthens the integration of economic interests between both parties[53].



In addition, China relies on investment partnerships and production alliances as flexible mechanisms to bypass regulatory and political constraints in host countries. This model allows for the sharing of ownership and risk between local actors and Chinese companies, while ensuring gradual entry into sensitive sectors without provoking strong political or social resistance. In many cases, these partnerships evolve into platforms for subsequent expansion, further strengthening China's presence in the sector over the medium and long term[54].

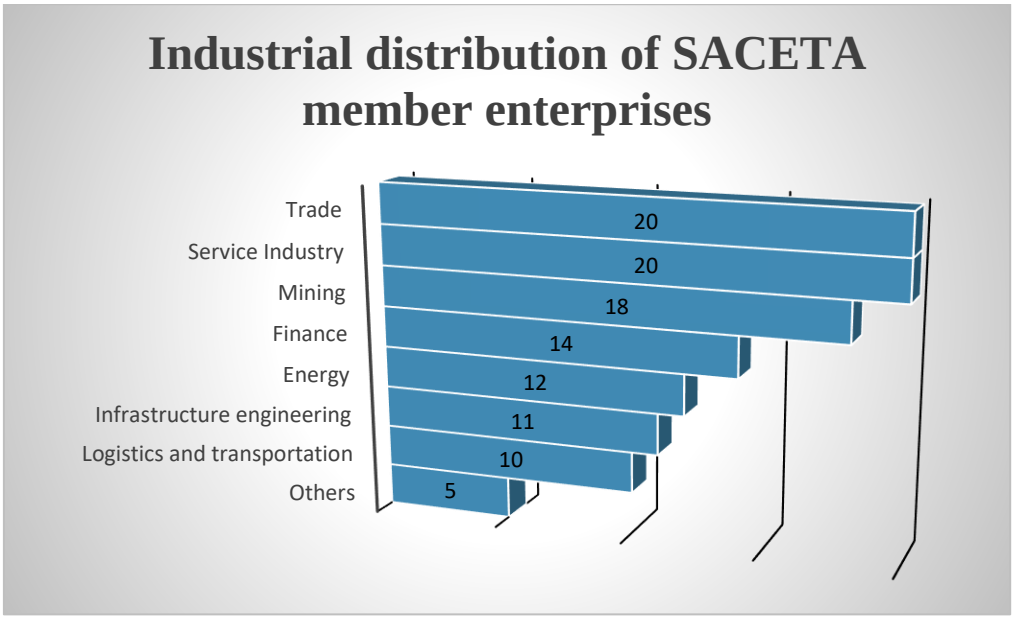
The report titled *Report on the Development of Chinese Enterprises in South Africa (2021–2022)*, issued by the Joint Conference of Chinese Overseas Chambers of Commerce (JCCOCC) and the South Africa–China Economic and Trade Association, classifies the share of enterprises operating in South Africa as follows:

Figure 5 : Nature of Chinese enterprises in South Africa



Source[55].:

fig (6) Industrial distribution of SACETA member enterprises



Source[56].:

is added to the previous table: Manufacturing 25, Information and communication 27

By the end of 2021, total Chinese investment in South Africa reached approximately **USD 25 billion**, with more than **200 Chinese companies**, including representative offices, operating within the country. This economic presence includes around **140 large and medium-sized enterprises** active across diverse sectors, most notably **energy, finance, mining, household appliances, telecommunications,**

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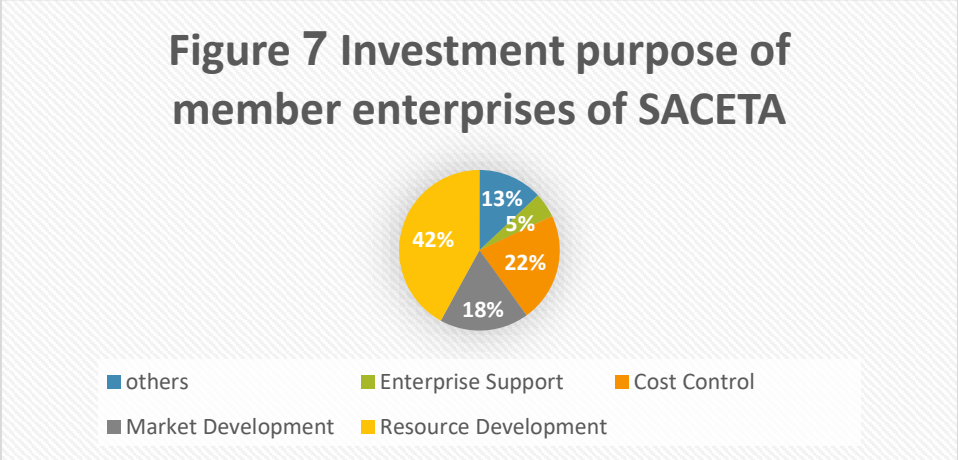
automotive manufacturing, mechanical engineering, real estate, textiles and clothing, and logistics services, as well as several other industries [57].

Fig (7) Investment purpose of member enterprises of SACETA



Source: [58]

From a more structural perspective, Chinese influence is also evident in its ability to reposition itself within global mineral value chains, moving from primary extraction to more advanced stages, including initial processing, partial refining, transportation, and international trade. This shift reflects what can be described as ***"vertical integration"*** within the production chain, aimed at reducing dependence on international intermediaries and increasing control over the flows of strategic raw materials, in line with China's industrial and technological needs[59]. In addition to direct economic tools, the institutional–political dimension emerges as a supporting factor for economic penetration, where bilateral relations between China and South Africa—within the framework of a comprehensive strategic partnership and coordination under the BRICS bloc—are employed to facilitate the investment environment and reduce political and regulatory risks. This framework helps create a more favorable institutional climate for Chinese companies and lends economic expansion an indirect geopolitical dimension that enhances its sustainability[60].

Hitherto, it can be argued that Chinese economic penetration mechanisms in South Africa's mining sector do not operate in isolation or in a linear manner, but rather within an interconnected network of financial, investment, and political tools. Collectively, these mechanisms generate a gradual form of economic influence that goes beyond direct ownership to reach a structural impact on the sector's organization and on South Africa's position within the global mineral economy.

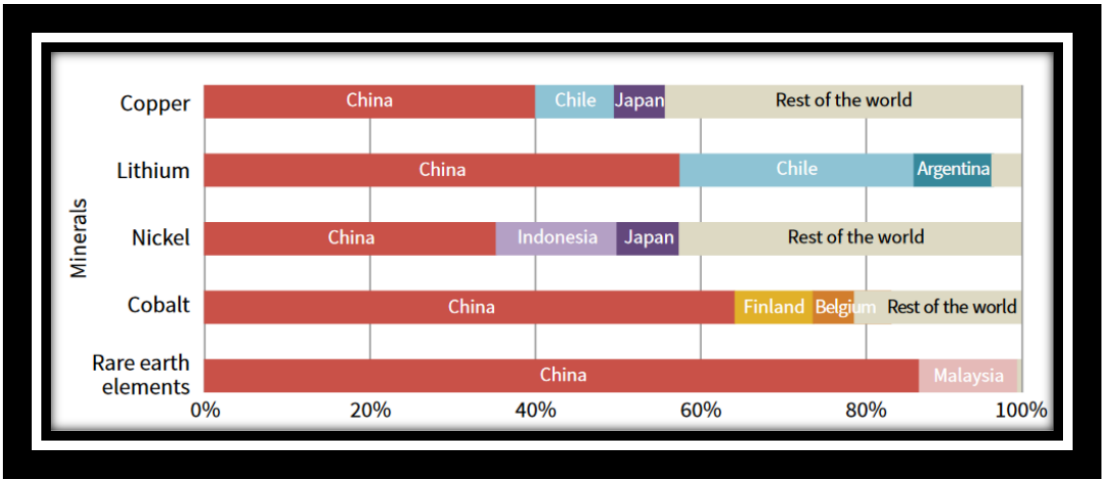
6. Policy Recommendations

- South Africa should strengthen resource governance, promote technology transfer, encourage domestic processing capacity, and maintain balanced international investment relationships. Chinese economic penetration in

South Africa's mining sector has produced a set of complex structural effects that span multiple levels, including the sector's production base, the macroeconomic structure, and the nature of its integration into the global economy. These effects can be understood within the framework of international political economy, which links foreign investment flows to the reconfiguration of dependency patterns and asymmetrical interdependence, particularly in strategically sensitive extractive industries[61].

- Chinese companies have strengthened their influence across most minerals, recording notable growth, particularly in cobalt and lithium, at rates exceeding those of their Australian counterparts despite smaller production volumes. At the same time, the position of African companies has declined, while Australian firms, including multinational corporations from industrialized countries, have maintained their dominant role in the global mining sector. Part of these shifts can be attributed to the industrial legacy of the Soviet Union, which was based on heavy industry and self-sufficiency, and the structural transformations that followed its collapse in 1991[62].
- China has reinforced its dominance in the rare earth elements market through strategic policies rather than mere resource abundance. This has prompted Western countries to establish the Minerals Security Partnership in 2022 and to reduce Chinese influence. These efforts intensified following Beijing's imposition of export restrictions on gallium and germanium in 2023, raising concerns that such restrictions could be extended to rare earth elements and their processing technologies. In August 2023, Nigeria, followed later by Namibia and the Democratic Republic of Congo, suspended certain illegal Chinese mining activities, including operations linked to Ruitei Titanium Mining Company, due to violations in resource extraction practices[63].
- Western industrial countries further intensified efforts to secure independent sources of critical minerals after China imposed export controls on gallium and germanium in July 2023, fueling concerns that such restrictions could expand to rare earth elements or their processing technologies[64].

Fig (8): Share of processing volume by country for selected critical minerals, 2019



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Source: [65].

- At the sectoral level, Chinese investments have contributed to a partial restructuring of production capacity in the mining sector by providing substantial capital that enabled the upgrading of some existing mines and the expansion of production capacity in specific projects. These investments have also helped improve certain components of the sector's related infrastructure, particularly logistics, transport networks, and energy systems that support extraction operations, thereby helping sustain production amid operational challenges such as rising energy costs and the aging of some facilities.
- Among the 19 cobalt mining operations in the Democratic Republic of Congo, 15 are owned or partially owned by Chinese entities[66]. Since the first decade of the twenty-first century, China has become Africa's largest single creditor, leveraging its financial influence and strengthening bilateral relations to advance its long-term strategic interests on the continent[67]. European countries, led by the United States, have recognized the implications of China's acquisition of mineral resources in Africa, particularly as China has proactively and unhesitatingly turned to the African continent to secure raw materials essential to its resource security and expansion strategy[68].
- In 2022, the United States, the European Union, and several industrialized countries launched the Minerals Security Partnership to strengthen cooperation with resource-rich countries in sub-Saharan Africa, aiming to diversify critical mineral supply chains and reduce dependence on China[69]. The initiative was also reaffirmed. As a result, commentary has increasingly suggested that Africa is becoming a "second China continent." [70]
- However, this development has not been uniform across the sector as a whole; rather, its impact has remained selective and concentrated in specific projects, often linked to the strategic interests of Chinese companies or to particular minerals of high importance in global supply chains. This reflects a pattern of "uneven modernization" that enhances partial productive capacities without bringing about a comprehensive structural transformation of the local mining sector[71].
- From another perspective, the deepening Chinese presence has contributed to Africa's integration into global mineral value chains. However, this integration has largely remained based on the export of raw or semi-processed materials, while advanced processing and final manufacturing remain concentrated outside the continent. This results in what can be described as a "peripheral positioning" within the value chain, where countries remain primary commodity suppliers without fully moving into higher value-added stages, thereby limiting the sector's long-term developmental impact[72].
- At the macroeconomic level, Chinese investments have contributed to strengthening foreign direct investment inflows and improving certain trade balance indicators, particularly through mineral exports to the Chinese market. They have also supported selected growth indicators during specific

periods by stimulating demand for raw materials and expanding investment activity in sectors linked to mining.

- However, this increasing integration into the Chinese market has, in turn, produced a degree of re-centering of trade dependence, as China has become a key partner in absorbing South African mineral exports. This has heightened the local economy's sensitivity to fluctuations in Chinese demand cycles and economic conditions. It also reinforces a pattern of asymmetric interdependence, whereby China has a greater capacity to influence the terms of exchange than the South African economy.
- This influence further raises concerns regarding the distribution of value added within the domestic economy, as economic literature suggests that a significant share of returns associated with global mining value chains is captured outside the host country, whether through raw material exports or through profit repatriation and external reinvestment. This limits the mining sector's ability to play a transformative role in the broader development of mineral-related manufacturing industries.
- At the institutional level, the expansion of Chinese firms in the sector raises questions regarding natural resource governance and economic sovereignty, as considerations of attracting investment intersect with the need to maintain national control over strategic sectors. This is reflected in debates about companies' involvement in domestic regulatory frameworks.
- The Chinese model has even impressed the USA, and the Trump administration has been interested in the mines of various countries, including, but not limited to, Balochistan, in Pakistan. Hence, this model could be further regressed into motion to develop a systematic framework to establish mutual international or bilateral cooperation.

Based on the above discussions, the Chinese impact on the mining sector in South Africa can be described as dual and complex: on the one hand, it enhances productive capacity and increases the economy's exposure to global investment and trade flows; on the other hand, it reproduces patterns of structural dependence and peripheral positioning within value chains, posing long-term challenges to economic diversification and industrial transformation in South Africa.

7. Conclusion

China's influence in South Africa's mining sector reflects wider transformations in global economic power. Managing this relationship requires policies that maximize developmental benefits while protecting economic autonomy. In brief, China's dominance in the rare earth elements market is driven more by strategic policies than by geographical or geological factors[73]. China's motives and its growing interest in extracting natural resources in Africa, regardless of environmental implications[74], have increasingly drawn comparisons to a new form of colonialism[75]. This study concludes that Chinese influence in South Africa's mining sector is a complex phenomenon that goes beyond narrow economic explanations and should instead be situated within the framework of international political economy as one manifestation of the reconfiguration of power relations in the contemporary global system. It has become clear that this influence did not

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emerge spontaneously or incidentally, but rather as a result of a long-term Chinese strategy that linked domestic growth requirements to the need to secure stable sources of strategic minerals outside its borders through multi-layered investment, financial, and institutional instruments. The study shows that South Africa's mining sector constitutes a strategic economic structure with a dual character: on the one hand, it is a key pillar of the national economy and a major source of foreign exchange and employment; on the other hand, it is an open arena for international competition over natural resources. This intersection between the domestic and the international has made the sector a meeting point between national development imperatives and the strategies of external actors, foremost among them China.

In this context, the findings indicate that Chinese penetration has relied on an integrated set of economic tools, including foreign direct investment, targeted development finance, and production partnership models, to reposition itself within global mineral value chains. This diversity of instruments has enabled Chinese firms to build a gradual and cumulative form of economic influence, rather than a sudden or single-dimensional form of penetration. However, despite gains such as increased investment inflows and certain productive capacities, this expansion has also generated structural challenges. These include the deepening of asymmetric interdependence and the continued positioning of the South African economy at the lower end of global value chains, which limits prospects for advanced industrial transformation. The study also highlights challenges related to value-added distribution and the extent to which the domestic economy benefits from the long-term returns of foreign investment in the sector.

At the geopolitical level, the study confirms that Chinese influence in the mining sector cannot be separated from a broader context of great-power competition over strategic minerals, particularly in light of global energy transition dynamics and technological development. South Africa, therefore, is no longer merely a resource-producing country but has become a strategic node in global supply networks, increasing its geopolitical sensitivity and the complexity of managing its natural resources. It can be argued that one of the most significant factors facilitating Chinese corporate penetration into Africa—and displacing European and American investment—has been the painful historical legacy experienced by African societies under previous colonial rule across East, West, North, and Southern Africa. Consequently, China was initially perceived as an investor rather than a colonizer, which enabled its projects to be more readily accepted and to replace those of European and American actors. Simultaneously, the study recommends adopting a more balanced policy approach toward foreign investment, one that strengthens institutional governance frameworks, enhances the state's bargaining capacity, and links investments to requirements for technology transfer and industrial localization, thereby maximizing developmental benefits. It also emphasizes the importance of diversifying economic partnerships and reducing geographical concentration in foreign trade to mitigate the risks of overdependence on a single market.

In conclusion, Chinese influence in South Africa's mining sector reflects a deeper transformation in the structure of the global economy, where economic tools increasingly intersect with geopolitical logic, and natural resources become central to the reconfiguration of international power relations—making the study of this phenomenon essential for understanding the dynamics of the contemporary international system.

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Author Contribution:

All authors contributed equally to the main contributor to this paper. All authors reviewed and approved the final version of the manuscript prior to submission.

Declaration of generative AI and AI-assisted technologies in the writing process

The authors hereby declare that no generative artificial intelligence or AI-assisted technologies were used at any stage during the preparation of this manuscript, including language editing, proofreading, or content development. The authors take full responsibility for the originality and integrity of the work presented in this publication.

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Conflicts of Interest:

“The authors declare no conflict of interest.”

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